

August 2021

# Gathering data about developer services: Data request 2020-21

## About this document

This document follows our consultation on the collection of additional data to inform the regulation of the developer services market as part of the 2024 price review ([PR24](#)).<sup>1</sup>

We explain how we have considered the feedback received from stakeholders and outline the changes we have subsequently made to the developer services information request, which accompanies this document. We also provide guidance to companies when completing the information request.

The developer services information request will collect additional developer services 2020-21 data from the incumbent water and wastewater companies. This exercise will help us and companies understand the extent of data available and able to be reported, and what changes companies need to implement in order to report fully on the 2021-22 reporting year.

### Deadline for completing the developer services data request

The deadline for receiving completed data requests and accompanying commentary is **Friday 8th October 2021**.

**We ask companies to provide accompanying commentary alongside the completed data request**, which sets out:

- The approach/methodology taken to complete each table and any assumptions that have been applied.
- An indication of the level of confidence behind the data provided in each table (e.g., RAG ratings).

Please email the completed data request and any accompanying commentary to [OfwatPandO@ofwat.gov.uk](mailto:OfwatPandO@ofwat.gov.uk).

If you have any issues with completing the data request by this date, or wish to discuss any aspect of the data request, please contact us using the same email address.

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<sup>1</sup> Ofwat, June 2021. [Gathering data about developer services – a consultation](#).

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# 1. Introduction

This document follows our consultation on the collection of additional data to inform the regulation of the developer services market as part of the 2024 price review (**PR24**).<sup>2</sup>

We explain how we have considered the feedback received from stakeholders and outline the changes we have subsequently made to the developer services information request, which accompanies this document. We also provide guidance to companies when completing the information request.

The developer services information request will collect additional developer services 2020-21 data from the incumbent water and wastewater companies. This exercise will help us and companies understand the extent of data available and able to be reported, and what changes companies need to implement in order to report fully on the 2021-22 reporting year.

The additional developer services data we collect through this exercise will also help us to make an informed decision on how to regulate developer services at PR24. More specifically the additional developer services data we receive from the incumbent water and wastewater companies will:

- inform our view on whether an option that relies more on competition can be justified;
- help refine existing uncertainty mechanisms within the price control; and
- support the evolution of the cost assessment.

The remainder of the document is organised as follows:

- **Section 2** sets out some background and context behind the need to collect additional developer services data.
- **Section 3** outlines the contents of the developer services data consultation.
- **Section 4** presents the structure of the developer services data request and the changes we have made in response to stakeholder feedback.
- **Section 5** sets out our next steps.
- **Appendix A** defines the key terms included in the developer services data request.

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<sup>2</sup> Ofwat, June 2021. [Gathering data about developer services – a consultation](#).

## 2. Background

The 2024 price review (**PR24**) will set the price service and incentive package for incumbent water companies for the 2025–30 period. In May 2021, we shared our ideas and ambitions for PR24 in [PR24 and beyond: Creating tomorrow, together](#). We identified that while there is evidence that the level of competition in developer services is increasing, there may be scope to further enhance competition.

Developer services in the water sector are subject to competition. When a developer requires new water and/or wastewater connections to a new development site, they can request the incumbent water company or a new appointee (**NAV**) to provide the necessary infrastructure and service the site. Alternatively, developers may choose a contractor to provide the necessary pipework and related services. This is known as self-lay provision, and we refer to these contractors as self-lay providers (**SLPs**). However, not all developer services activities in the water sector are contestable (or contested) and so elements of the work must be provided by the local incumbent water company. In addition, while there is significant market penetration from SLPs and NAVs in some company areas, many developers continue to rely on their local incumbent company for the provision of developer services. Consequently, developer service activities of incumbent water companies are still subject to price control regulation.

In PR19 we included developer services costs in our base (or on-going) expenditure allowances and committed to adjust revenues at PR24 to reflect differences between forecast and outturn numbers of new connections.

In our May 2021 discussion document, based on earlier work from CEPA<sup>3</sup>, we identified two options for the regulation of developer services for PR24:

- **Option 1: an adaptation of the current regulatory approach**, where all developer services continue to be included within the network-plus price control, but improving the approach to cost assessment and reconciliations, potentially with a view to a further transition towards more separate regulation or deregulation of developer services at future price controls. The focus would be on cost assessment improvements, which could be enabled through enhanced data collection, and/or improvements to the design of the regulatory framework.
- **Option 2: a more fundamental change in the approach to regulating developer services at PR24** that would be more reliant on ‘backstop’ regulation of contestable developer services, akin to Ofgem’s approach to regulating electricity new connections. Under this option, contestable developer services (assumed to be site specific work) would be excluded from the network-plus price controls but would initially be subject to a capped regulated margin. Non-contestable work (i.e., network reinforcement) would be

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<sup>3</sup> CEPA, May 2021, "Approach to the regulation of developer services at PR24", available on our website [here](#).

expected to remain within the scope of the separate water and wastewater network plus price controls. This would require a licence modification.

We also stated that we were continuing to consider whether a separate control for contestable (site specific) developer services would be beneficial.

CEPA concluded that Option 2 appeared to be the more suitable ambition for PR24 based on current information as it offers the potential of a simpler approach to promoting customers' interests in contestable developer services.

But this conclusion was based on an uncertain assessment of the current state of the market as CEPA were unable to carry out a market study of developer services because of the absence of good quality information. For example, it is currently challenging to assess the degree of contestability across different types of new development and different regions of England and Wales, and/or define the relevant product and geographic markets(s) in developer services.

To help inform the decision on which option to take forward for PR24 we stated we would:

- **Introduce more prescriptive developer services cost allocation guidance.** As part of this we are issuing guidance on the allocation of overheads to developer services as well as other elements of the price control.
- **Enhanced collection and use of developer services data,** which would enable us to conduct a more comprehensive 'state of the market' review. This could encompass collecting data on costs, revenues and information on market penetration of other companies that provide developer services: SLPs and NAVs. This data may provide more confidence that an option that relies more on competition can be justified. The improvements in data availability will also help the refinement to existing uncertainty mechanisms within the price control, e.g., the Developer Services Revenue Adjustment, and/or support the evolution of the cost assessment at PR24.

### 3. Gathering data about developer services consultation overview

In June 2021 we consulted on the additional data that we propose to collect on developer services. The consultation was informed by consultants CEPA, who we commissioned to help develop the additional developer services data requirements.

CEPA found potential gaps in the developer services data currently collected across three main areas:

- **Demand and supply information** – this data will help to provide indicators of the current and future state of competition in the developer services market in different regions of the country and by different types of new development.
- **Costs and revenues** – this will encompass data on incumbent company costs and revenues for different types of developer services and development types. This will help with the design of PR24 regulatory arrangements, our approach to cost assessment and provide further information on the state of competition.
- **Cost drivers** – this will encompass data on the drivers of incumbent company developer services costs. This will help with design of PR24 regulatory arrangements and the approach to cost assessment.

CEPA engaged with the incumbent companies and wider stakeholders to explore the extent to which these gaps could be filled with data already collected, and how much additional collection, allocation and reporting system changes would be needed. CEPA also considered the level of granularity of information to be collected, and what would be the most appropriate way to segment the data to give the best reflection of the state of the developer services market.

CEPA identified the following data requirements:

- Data should be **segmented** by what **services are required** (connections only, or new mains and sewers too); by **size of development** (number of properties, length of new mains and sewers laid); data should be disaggregated by **new developments served by NAVs and incumbents** as NAVs are better placed to provide data on NAV sites; data should also be split by **work type** – i.e. site-specific (service connection, mains/sewer requisition, and diversion), local network reinforcement and indirect / other data to mirror current data collection processes; with a further disaggregation based on the **proportion of contestable work** undertaken by the incumbent to allow comparison on a like-for-like basis (i.e., scope of activities undertaken by the incumbent is approximately the same when comparing different developments).
- **Demand and supply information** would show the level of **SLP and NAV market share**, for different development segments; would include **information on quotes** given,

accepted and negotiated, including their value; and would describe the **number of SLPs and NAVs operating** in their areas;

- **Costs and revenues data** should be provided for the different segments, and for contestable and non-contestable services;
- **Cost drivers** should be included for length of communication pipe and ground surface type (man-made surface such as road or footpath, or unmade ground which may feature grass or topsoil).

We provided CEPA's proposed data requirements as the developer service pro-forma issued as part of this consultation.

We set out our intention to collect the additional developer services data through the annual performance reporting (APR) process. But data for the 2021-22 reporting year will not be available until July 2022, which would be too late to inform our PR24 draft methodology.

**We therefore proposed to collect data for 2020-21 during the current financial year.**

This exercise will help us and companies understand the extent of data available and able to be reported, and what changes companies need to implement in order to report fully on the 2021-22 reporting year.

## 4. Developer services data request

The incumbent water and wastewater companies have engaged positively during the consultation process. We are grateful for the support and feedback we have received on the developer services pro-forma issued as part of the consultation and have carefully considered all the feedback received.

In response to the feedback received:

- **the data request has been simplified in response to stakeholder feedback;**
- **the amount of data requested has been substantially reduced;**
- **the definitions have been refined to improve clarity and understanding; and**
- **the deadline for receiving completed data requests has been extended to Friday 8th October 2021.**

We set out a number of questions within the consultation to help us understand how we can achieve our ambitions regarding the regulation of developer services. We provide a summary of responses, and how we have reflected on the feedback received in the developer services data request, below.

**Table 4.1: Overview of stakeholder responses and Ofwat actions**

Question	Stakeholder responses	Ofwat actions
<b>Do you envisage having any problems completing the data request for 2021-22 by July 2022, or the historical data for 2020-21 by w/c 20 September 2021?</b>	<ul style="list-style-type: none"> <li>• The companies considered that the data request would be difficult to complete by September 2021 because of the manual nature of the exercise and other ongoing developer services commitments.</li> <li>• The July 2022 data request was deemed more feasible as data reporting system changes can be made. But may still require some manual input.</li> <li>• Covid impact may distort 2020-21 developer services impact.</li> <li>• The data would not align with other developer services data provided in the APR.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Deadline for data request extended to 8 October.</b></li> <li>• <b>Reduced time period of quotation data collection to 3 months</b> (01/2021 to 03/2021).</li> <li>• <b>Removed the wastewater quotation / cost advice table</b>, and we will reassess whether wastewater data is needed ahead of 2021-22 APR submission.</li> <li>• <b>Alternative data format</b> is reflected in revised data request.</li> <li>• <b>Network reinforcement removed from data request as it is not site specific.</b> We will consider how to improve network reinforcement data collection through the Cost Assessment Working Group.</li> </ul>
<b>If you envisage problems with providing the full historical dataset for 2020-21, what areas would you remove from the data request, or how much additional time would you need to meet the request?</b>	<ul style="list-style-type: none"> <li>• Request data for shorter time period.</li> <li>• Remove wastewater data tables as most developer services work is not done by incumbents.</li> <li>• Alternative data format whereby a list of new developments is reported was preferred by several companies.</li> <li>• Remove network reinforcement as it is not site specific.</li> <li>• Reduce development size bands.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Development size band issue no longer an issue</b> because of alternative data format.</li> <li>• <b>Continue to request NAV data but recognise that the data provided on NAV served developments may be estimated or not available.</b></li> </ul>

Question	Stakeholder responses	Ofwat actions
	<ul style="list-style-type: none"> <li>Remove NAV data as companies are not best placed to report it. Collect data on an in-year basis rather than a 'completed project' basis to align with APR.</li> <li>Collect data on an in-year basis rather than a 'completed project' basis to align with APR.</li> </ul>	<ul style="list-style-type: none"> <li><b>Continue to request data on a 'completed project' basis to maximise the value from the data request.</b> But we only expect companies to report on development projects / phases that started/commenced up to 5 years ago.</li> </ul>
<p><b>Are the definitions (provided in the cover worksheet) clear enough to mitigate the risk of reporting inconsistencies between companies? If not, what changes would you recommend?</b></p>	<ul style="list-style-type: none"> <li>Companies made a number of helpful suggestions on how definitions could be improved and clarified.</li> <li>Particularly on how to define: <ul style="list-style-type: none"> <li>Financially closed projects</li> <li>Majority provider</li> <li>Quote / cost advice status</li> <li>Connection / property numbers</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li><b>All relevant suggestions have been reflected in the definitions outlined in Appendix A.</b></li> <li>If any definitions remain unclear, please get in touch by the 15th August to clarify.</li> </ul>
<p><b>Would you be able to provide information on cost drivers, in particular length of communication pipe and surface type (split into made/unmade)?</b></p>	<ul style="list-style-type: none"> <li>There were mixed responses on the availability of additional cost driver information.</li> <li>Data on communication pipe length is more readily available than surface type, but would still require manual work, and may not be available for all new developments (e.g., SLP work).</li> </ul>	<ul style="list-style-type: none"> <li><b>Communication pipe length added to data request.</b> But we recognise the data may not always be available for all new developments.</li> <li><b>Data on surface type is not formally requested in the data request.</b> But companies can provide info on important additional characteristics, including surface type, in the comment column if available.</li> </ul>
<p><b>Are there any key new development characteristics you think are missing from the data request and should be included?</b></p>	<ul style="list-style-type: none"> <li>Some companies suggested splitting data based on non-household and household connections.</li> <li>Identifying when excavation and reinstatement is required is important as it is costly but largely done by developers themselves.</li> <li>One company suggested that more data should be collected on network reinforcement costs and cost drivers.</li> </ul>	<ul style="list-style-type: none"> <li><b>'Connection type'</b> (i.e., standard vs. non-standard connection) and <b>household vs. non-household</b> labels added to data request.</li> <li><b>Services required broken down to a higher level of granularity</b> (e.g., including / excluding excavation, including / excluding mains diversion).</li> <li><b>Network reinforcement cost driver data to be explored at the Cost Assessment Working Group.</b></li> </ul>
<p><b>Is there any additional developer services data you collect that you think would be helpful to Ofwat?</b></p>	<ul style="list-style-type: none"> <li>A couple of responses suggested requesting data for each local authority area in order to better assess geographical patterns.</li> <li>Other suggestions included the length of pipe laid between site and mains connection and number of SuDS (sustainable drainage solutions) adopted.</li> </ul>	<ul style="list-style-type: none"> <li><b>The data request should allow data to be analysed at the local authority level (i.e., post codes).</b></li> <li>Additional data that would be helpful can be provided alongside the data request if available, and/or mentioned in the 'comment' column / accompanying commentary.</li> </ul>
<p><b>Would an alternative data format be more appropriate (e.g., list / table of new developments connected in reporting year alongside relevant cost / revenue data and characteristics)?</b></p>	<ul style="list-style-type: none"> <li>Several companies preferred the alternative data format presented at the workshop (i.e., list of new developments).</li> </ul>	<ul style="list-style-type: none"> <li><b>Data request changed to reflect alternative format presented in workshop.</b></li> </ul>

Source: Ofwat summary of stakeholder responses to the developer services data consultation

The data request now consists of four tables, which are described below.

**Table 4.2: Developer services data request - table descriptions**

Table	Title	Description
1	Wholesale Water Network+ - Wholesale Water Network+ - Developer services projects/phases completed in the 12 months from 1 April 2020 to 31 March 2021	<p>The aim of this table is to provide a detailed overview of all wholesale water (i.e., obtaining a water supply for a new development) developer services projects/phases that were financially closed / completed in the 12-month period between 1st April 2020 and 31st March 2021, broken down by each new development.</p> <p>A site may have multiple phases, but if one phase is applied and designed for separately, then this should be captured separately in the data request.</p> <p>Completed new development projects / phases that started / commenced within the last 5 years should be captured.</p> <p>This table will enable Ofwat to assess how the level of contestability differs for different new development types and assess how costs and cost recovery vary for different new development types.</p> <p>It is important to obtain data on financially closed new development projects / phases so that costs, revenues and workloads/volumes are all aligned.</p>
2	Wholesale Water network+ - Wholesale Water network+ - Developer services cost advice / quotations provided in the 3 months between 1 January 2021 to 31 March 2021	<p>The aim of this table is to provide a summary of all wholesale water (i.e., obtaining a water supply for a new development) developer services quotes / cost advice that were provided by the incumbent in the 3-month period between 1st January 2021 and 31st March 2021.</p> <p>The purpose of this is to allow Ofwat to assess the level of contestability for different types of new developments.</p> <p>Please only report details of the latest cost advice / quote provided for each new development. The worksheet should only contain one quote for each new development site (i.e., the latest cost advice / quote).</p>
3	Wholesale Water Network+ - Wholesale Water Network+ - SLPs and NAVs competing in incumbent region during the 12 months from 1 April 2020 to 31 March 2021	<p>The aim of this table is to collect data on self-lay providers (SLPs) and new appointments and variations (NAV) who competed for contestable wholesale water developer services work (i.e., site specific work) within the incumbent's region in the 12-month period between 1st April 2020 and 31st March 2021. We recognise that NAV data may need to be estimated.</p>
4	Wholesale Wastewater Network+ - Developer services projects/phases completed in the 12 months from 1 April 2020 to 31 March 2021	<p>The aim of this table is to provide a detailed overview of all wholesale wastewater (i.e., obtaining sewerage services for a new development) developer services projects/phases that were financially closed / completed in the 12-month period between 1st April 2020 and 31st March 2021, broken down by each new development.</p> <p>A site may have multiple phases, but if one phase is applied and designed for separately, then this should be captured separately in the data request.</p> <p>Completed new development projects / phases that started / commenced within the last 5 years should be captured.</p> <p>This table will enable Ofwat to assess how the level of contestability differs for different new development types and assess how costs and cost recovery vary for different new development types.</p> <p>It is important to obtain data on financially closed new development projects / phases so that costs, revenues and workloads/volumes are all aligned.</p>

As described in the contents page of the data request:

- Manual data input is required in the yellow shaded cells
- Please select an option from the drop-down list in the blue shaded cells

**We ask companies to provide accompanying commentary alongside the completed data request**, which sets out:

- The approach/methodology taken to complete each table and any assumptions that have been applied.
- An indication of the level of confidence behind the data provided in each table (e.g., RAG ratings).

**We do not want companies to be unnecessarily constrained by the format of the data request. Please feel free to provide any additional useful information you have available that does not necessarily fit into the data format requested.** We have inserted a 'comment' column into each worksheet / table to allow for any additional information to be inserted, and additional information can also be provided within the accompanying commentary if helpful.

## 5. Next steps

The deadline for receiving completed data requests and accompanying commentary is **Friday 8th October 2021**.

We will use the data submitted by companies to:

- Update our final regulatory accounting guidelines for 2021-22.
- Undertake an initial assessment of competition in the developer services market, if the data is of sufficient quality, which will help to inform our PR24 draft methodology.

We may need to consult further on our regulation of the developer services market in 2022 or 2023, but this will depend on the insights drawn from the 2020-21 and 2021-22 additional developer services data collection exercise.

The high-level timetable of developer services data collection is outlined below.

**Table 5.1 – high-level timetable of developer services data collection**

24 June 2021	Ofwat consults on developer services data requirements
22 July 2021	Consultation responses received
w/c 2 August 2021	Ofwat issues updated data tables for 2020-21
8 October 2021	Companies respond to request for 2020-21 data
Late 2021	Ofwat issues final RAGs for 2021-22. The 2021-22 developer services data tables may be published separately to the revised RAGs if amendments are required following the 2020-21 data collection exercise.
June/July 2022	Ofwat publishes PR24 draft methodology
July 2022	Companies submit 2021-22 data as part of annual performance reports
December 2022	Ofwat publishes PR24 final methodology

## Appendix A: Developer services data request – Glossary

**Table 1: Wholesale Water Network+ – Developer services projects/phases completed in the 12 months from 1 April 2020 to 31 March 2021**

Reference	Term	Definition
1.01	Development description and post code	Please provide a brief description of the new development and post code of the new development (or nearest to).
1.02	Start date	The date new water infrastructure construction commenced at the new development and/or phase of development. A site may have multiple phases, but if one phase is applied and designed for separately, then this should be captured separately in the data request. Completed new development projects / phases that started / commenced within the last 5 years should be captured.
1.03	End date	The date the new development project / phase was financially closed / complete during the 2020–21 financial year. A site may have multiple phases, but if one phase is applied and designed for separately, then this should be captured separately in the data request. Completed new development projects / phases that started / commenced within the last 5 years should be captured.
1.04	Development served by	Select whether the new development is served by the incumbent or a NAV (new appointments and variations). NAVs are appointed water and/or wastewater companies which provide a water and/or sewerage service to customers in an area for which the incumbent (or a predecessor of the incumbent) was previously the appointed water company..
1.05	Services required from the incumbent or third-party provider (SLP or NAV)	Select the services the developer required from the incumbent or third-party provider [SLP (self-lay provider) or NAV] to obtain a water supply to the new development from the drop-down list: <ul style="list-style-type: none"> <li>• Connection to existing main [no SLP or NAV involvement]</li> <li>• New water mains and associated connections [no SLP or NAV involvement]</li> <li>• New water mains and associated connections; water mains diversion [no SLP or NAV involvement]</li> <li>• Connection to existing main [SLP]</li> <li>• New water mains and associated connections [SLP]</li> <li>• New water mains and associated connections; water mains diversions [SLP]</li> <li>• NAV site</li> </ul> Please choose the category from the drop-down list that is most appropriate for the new development in question. The options allow you to indicate whether there was any third-party involvement in the delivery of developer services (i.e., SLP or NAV) or not.
1.06	Excavation, backfilling and reinstatement provided by incumbent?	Please state whether excavation, backfilling and reinstatement was provided by the incumbent to the developer. Select 'yes' or 'no' from the drop-down box.
1.07	Traffic management required?	Are costs payable as a result of compliance with the Traffic Management Act 2004? Please select one of the following options from the drop-down list:

Reference	Term	Definition
		<ul style="list-style-type: none"> <li>• No</li> <li>• 3 way temporary lights</li> <li>• 4 way temporary lights</li> <li>• Road closure</li> <li>• Other (please describe in comments)</li> </ul>
1.08	Connection type	<p>Please select one of the following options from the drop-down list:</p> <ul style="list-style-type: none"> <li>• Standard (25-32mm PE pipe)</li> <li>• Non-Standard (&gt;32mm PE pipe)</li> <li>• Mixed (Standard and Non-Standard)</li> </ul>
1.09	Household or Non-Household?	<p>Please select whether the new development is intended to be used for household or non-household purposes from the drop-down list, or a mix of household and non-household.</p> <p>Household means any premises used principally as a domestic dwelling or intended for such use, such as a house or flat.</p> <p>Non-household means any premises being used principally for industrial, business, recreational or community purposes and not as a dwelling, or intended for such use.</p>
1.10	Connections - incumbent	<p><b>Total number of new service connections</b> between a property (or properties) and a new/existing water main at project/phase financial close, that are <b>serviced by the incumbent and the incumbent does the tapping</b>.</p> <p>This should:</p> <ul style="list-style-type: none"> <li>• exclude the number of new service connections served by the incumbent where a SLP do the tapping (1.11);</li> <li>• exclude the number of service connections served by a NAV (1.12); and</li> <li>• exclude connections between an existing main and a new requisition main.</li> </ul> <p>The figure should not necessarily be the same as 1.13 since one new service connection could serve multiple properties, or a new connection could be required in an existing property.</p>
1.11	Connections – SLP	<p><b>Total number of new service connections</b> between a property (or properties) and a new/existing water main at project/phase financial close, that are <b>serviced by the incumbent but where a SLP does the tapping</b>.</p> <p>This should:</p> <ul style="list-style-type: none"> <li>• exclude the number of new service connections served by the incumbent where the incumbent does the tapping (1.10);</li> <li>• exclude the number of service connections served by a NAV (1.12); and</li> <li>• exclude connections between an existing main and a new requisition main.</li> </ul> <p>The figure should not necessarily be the same as 1.14 since one new service connection could serve multiple properties, or a new connection could be required in an existing property.</p>
1.12	Connections – NAV (if known)	<p><b>Total number of new service connections</b> between a property (or properties) and a new/existing water main at project/phase financial close, that are <b>serviced by a NAV</b> (if known).</p> <p>This should:</p>

Reference	Term	Definition
		<ul style="list-style-type: none"> <li>• exclude the number of new service connections served by the incumbent where the incumbent does the tapping (1.10);</li> <li>• exclude the number of new service connections served by the incumbent where a SLP does the tapping (1.11); and</li> <li>• exclude connections between an existing main and a new requisition main.</li> </ul> <p>The figure should not necessarily be the same as 1.15 since one new service connection could serve multiple properties, or a new connection could be required in an existing property.</p>
1.13	Properties connected - incumbent	<p><b>Total number of new properties (household and non-household)</b> added to the network at project/phase financial close, that are <b>served by the incumbent and where the service connections were made by the incumbent.</b></p> <p>This should:</p> <ul style="list-style-type: none"> <li>• exclude the number of new properties served by the incumbent but where the service connections were made by a SLP (1.14); and</li> <li>• exclude the number of new properties served by a NAV (1.15).</li> </ul> <p>For avoidance of doubt, a group of properties supplied by a single connection should be counted as several properties. They should only be treated as a single property if a single bill covers the entire property.</p>
1.14	Properties connected - SLP	<p><b>Total number of new properties (household and non-household)</b> added to the network at project/phase financial close, that are <b>served by the incumbent but where the service connections were made by a SLP.</b></p> <p>This should:</p> <ul style="list-style-type: none"> <li>• exclude the number of new properties served by the incumbent and where the service connections were made by the incumbent (1.13); and</li> <li>• exclude the number of new properties served by a NAV (1.15).</li> </ul> <p>For avoidance of doubt, a group of properties supplied by a single connection should be counted as several properties. They should only be treated as a single property if a single bill covers the entire property.</p>
1.15	Properties connected – NAV (if known)	<p><b>Total number of new properties (household and non-household)</b> added to the network at project/phase financial close, that are <b>served by a NAV</b> (if known).</p> <p>This should:</p> <ul style="list-style-type: none"> <li>• exclude the number of new properties served by the incumbent and where the service connections were made by the incumbent (1.13); and</li> <li>• exclude the number of new properties served by the incumbent but where the service connections were made by a SLP (1.14).</li> </ul> <p>For avoidance of doubt, a group of properties supplied by a single connection should be counted as several properties. They should only be treated as a single property if a single bill covers the entire property.</p>
1.16	Length of mains laid by incumbent (m)	Total length (m) of new water mains laid by the incumbent at project/phase financial close.

Reference	Term	Definition
1.17	Length of mains laid by SLP (m)	Total length (m) of new water mains laid by a SLP at project/phase financial close , which the incumbent water company adopts.
1.18	Length of mains laid by NAV (if known) (m)	Total length (m) of new water mains laid by a NAV at project/phase financial close (if known).
1.19	Length of communication pipe laid by incumbent (m)	Total length (m) of communication pipe laid by the incumbent water company at project/phase financial close . Communication pipes carry water between the water main and the boundary of the private property.
1.20	Length of communication pipe laid by SLP (if known) (m)	Total length (m) of communication pipe laid by a SLP at project/phase financial close (if known), which the incumbent water company adopts. Communication pipes carry water between the water main and the boundary of the private property.
1.21	Length of communication pipe laid by NAV (if known) (m)	Total length (m) of communication pipe laid by a NAV at project/phase financial close (if known), which the incumbent water company adopts. Communication pipes carry water between the water main and the boundary of the private property.
1.22	Approx. percentage of contestable work undertaken by incumbent	<p>Select the approximate percentage of contestable developer services work undertaken by the incumbent water company at project/phase financial close from the drop-down list:</p> <ul style="list-style-type: none"> <li>• 0% - 10%</li> <li>• 10% - 20%</li> <li>• 20% - 30%</li> <li>• 30% - 40%</li> <li>• 40% - 50%</li> <li>• 50% - 60%</li> <li>• 60% - 70%</li> <li>• 70% - 80%</li> <li>• 80% - 90%</li> <li>• 90% - 100%</li> </ul> <p>This could be based on the proportion of new water mains laid by the incumbent water company or something similar. This could include appropriate weighting for example by the amount of pipework on on-site or off-site. Please outline in accompanying commentary on the calculations / assumptions applied.</p>
1.23	Approx. percentage of contestable work undertaken by SLP	<p>Select the approximate percentage of contestable developer services work undertaken by SLPs at project/phase financial close from the drop-down list:</p> <ul style="list-style-type: none"> <li>• 0% - 10%</li> <li>• 10% - 20%</li> <li>• 20% - 30%</li> <li>• 30% - 40%</li> <li>• 40% - 50%</li> <li>• 50% - 60%</li> <li>• 60% - 70%</li> <li>• 70% - 80%</li> <li>• 80% - 90%</li> <li>• 90% - 100%</li> </ul> <p>This could be based on the proportion of new water mains laid by SLPs or something similar. This could include appropriate weighting for example by the amount of pipework on on-site or off-site. Please outline</p>

Reference	Term	Definition
		in accompanying commentary on the calculations / assumptions applied.
1.24	Site-specific construction work (excluding network reinforcement) – gross costs incurred by incumbent (£)	<p><b>Total actual outturn costs</b> incurred by the incumbent water company at <b>project/phase financial close</b> associated with the <b>work on, or provision of, water structures or facilities located on a development as well as work to provide and connect a requested main, communication pipe on to, or in the immediate vicinity of, the development.</b></p> <p>Where the developer services project includes any diversionary works, the costs for these works must be included here alongside other site-specific costs (e.g., service connection and mains requisition). Costs associated with the traffic management act should also be included here.</p> <p>For avoidance of doubt:</p> <ul style="list-style-type: none"> <li>• It does not refer to costs or work required as part of network reinforcement.</li> <li>• Indirect / overhead costs and pre-construction costs, including application and administration fees, should be excluded from this column (1.24) and captured instead in 1.26.</li> <li>• The value of adopted assets should be excluded.</li> </ul>
1.25	Site-specific construction work (excluding network reinforcement) – gross revenue received by incumbent (£)	<p><b>Total contributions received</b> by the incumbent water company from developers at <b>project/phase financial close</b> associated with the <b>work on, or provision of, water structures or facilities located on a development as well as work to provide and connect a requested main, communication pipe on to, or in the immediate vicinity of, the development.</b></p> <p>Where the developer services project includes any diversionary works, the contributions received for these works must be included here alongside other site-specific contributions (e.g., service connection and mains requisition).</p> <p>For avoidance of doubt:</p> <ul style="list-style-type: none"> <li>• Network reinforcement contributions should be excluded.</li> <li>• Contributions received by the incumbent water company attributable to Indirect / overhead costs and pre-construction costs, including application and administration fees, should be excluded from this column (1.25) and captured instead in 1.27.</li> <li>• Value Added Tax (VAT) should be excluded.</li> <li>• Revenue should be reported as a positive number and should be reported before the deduction of any discounts (e.g., income offset).</li> </ul>
1.26	Other developer services activities (excluding network reinforcement) – gross costs incurred by incumbent (£)	<p><b>Total actual outturn costs</b> incurred by the incumbent water company at <b>project/phase financial close</b> associated with <b>other developer services activities not captured in site-specific work (1.24). For example, indirect / overhead developer services costs and pre-construction costs, including application and administration fees.</b></p> <p>For avoidance of doubt:</p> <ul style="list-style-type: none"> <li>• Network reinforcement costs should be excluded.</li> <li>• The value of adopted assets should be excluded.</li> <li>• Any costs reported in 1.24 should not be included in 1.26 (i.e., no double counting).</li> </ul>

Reference	Term	Definition
1.27	Other developer services activities (excluding network reinforcement) – gross revenue received by incumbent (£)	<p><b>Total gross contributions received</b> by the incumbent water company at <b>project/phase financial close</b> associated with <b>other developer services activities not captured in site-specific work (1.25)</b>. For example, <b>indirect / overhead developer services costs and pre-construction costs, including application and administration fees</b>.</p> <p>For avoidance of doubt:</p> <ul style="list-style-type: none"> <li>• Network reinforcement contributions should be excluded.</li> <li>• Any contributions reported in 1.19 should not be included in 1.21 (i.e., no double counting).</li> <li>• Value Added Tax (VAT) should be excluded.</li> <li>• Gross revenue should be reported as a positive number and should be reported before the deduction of any discounts (e.g., income offset).</li> </ul>
1.28	Comments	Please provide any additional comments that you think may be helpful in our analysis (e.g., contaminated land; is excavation through rock or artificial hard material required; etc.). Any factors make the new development 'special' relative to other new developments.

**Table 2 - Wholesale Water network+ - Developer services cost advice / quotations provided in the 3 months between 1 January 2021 to 31 March 2021**

Reference	Term	Definition
2.01	Development description and post code	Please provide a brief description of the new development and post code of the new development (or nearest to).
2.02	Final cost advice / quote date	The date of the latest cost advice / quote provided by the incumbent water company to the developer for the new development in question. Please only report details of the latest cost advice / quote provided for each new development. The worksheet should only contain one quote for each new development site (i.e., the latest cost advice / quote).
2.03	Services included in incumbent quote to developer	Select the services included in the final cost advice / quotation value from the incumbent water company to the developer: <ul style="list-style-type: none"> <li>• Connection to existing main</li> <li>• Connection to existing main; new water mains</li> <li>• Connection to existing main; new water mains; water mains diversion</li> </ul> <p>Please choose the category from the drop-down list that is most appropriate for the cost advice / quote in question (or closest to). For avoidance of doubt, the full list of services included in the price advice / quote should be selected (or closest to).</p>
2.04	Excavation, backfilling and reinstatement provided by incumbent?	Please state whether excavation, backfilling and reinstatement was included in the quote price. Select 'yes' or 'no' from the drop-down box.
2.05	Traffic management required?	Were costs associated with the Traffic Management Act 2004 included in the quote / cost advice? Please select one of the following options from the drop-down list: <ul style="list-style-type: none"> <li>• No</li> <li>• 3 way temporary lights</li> <li>• 4 way temporary lights</li> <li>• Road closure</li> <li>• Other (please describe in comments)</li> </ul>
2.06	Connection type	Please select one of the following options from the drop-down list: <ul style="list-style-type: none"> <li>• Standard (25-32mm PE pipe)</li> <li>• Non-Standard (&gt;32mm PE pipe)</li> <li>• Mixed (Standard and Non-Standard).</li> </ul>
2.07	Household or Non-Household?	Please select whether the new development is intended to be used for household or non-household purposes from the drop-down list, or a mix of household and non-household. Household means any premises used principally as a domestic dwelling or intended for such use, such as a house or flat. Non-household means any premises being used principally for industrial, business, recreational or community purposes and not as a dwelling, or intended for such use.
2.08	Connections	Number of new service connections between a property (or properties) and a new/existing water main that are included in the cost advice / quote.  The figure should not necessarily be the same as 2.09 since one new service connection could serve multiple properties, or a new connection could be required in an existing property.

Reference	Term	Definition
2.09	Properties connected	Total number of new properties (residential and non-household) that will be added to the network as a result of the new development.
2.10	Length of new mains	Total length (km) of new water mains required as a result of the new development and included in the cost advice / quote.
2.11	Length of communication pipe	Total length (km) of communication pipe required as a result of the new development and included in the cost advice / quote. Communication pipes carry water between the water main and the boundary of the private property.
2.12	Site-specific construction work, excluding network reinforcement - incumbent final quotation value (£)	<p>The final quoted value for site-specific construction work provided by the incumbent water company to the developer associated with the work on, or provision of, water structures or facilities located on a development as well as work to provide and connect a requested main, communication pipe on to, or in the immediate vicinity of, the development.</p> <p>The final quoted value should include costs associated with any diversionary works alongside other site-specific costs (e.g., service connection and mains requisition). Costs associated with the traffic management act should also be included here.</p> <p>For avoidance of doubt:</p> <ul style="list-style-type: none"> <li>• It does not refer to costs or work required as part of network reinforcement.</li> <li>• Indirect / overhead costs and pre-construction costs, including application and administration fees, should be excluded from this column (2.12) and captured instead in 2.13.</li> </ul>
2.13	Other developer services activities, excluding network reinforcement - incumbent final quotation value (£)	<p>The final quoted value provided by the incumbent water company to the developer for other developer services activities not captured in site-specific work (2.12). For example, indirect / overhead developer services costs and pre-construction costs, including application and administration fees.</p> <p>For avoidance of doubt:</p> <ul style="list-style-type: none"> <li>• Network reinforcement costs should be excluded.</li> <li>• Any costs reported in 2.12 should not be included in 2.13 (i.e., no double counting).</li> </ul>
2.14	Convertible quote provided?	<p>A convertible quote sets out the price to the developer if the incumbent water company undertakes all the contestable work and also the price if the incumbent water company only undertakes the non-contestable work.</p> <p>Select 'yes' or 'no' from the drop-down list depending on whether you offered the developer a convertible quote.</p>
2.15	Quote status	<p>Select from the drop-down list whether the final cost advice / quote is:</p> <ul style="list-style-type: none"> <li>• <b>Accepted, contestable and non-contestable</b> – the developer has accepted the incumbent water company's final cost advice / quote in full, and the incumbent water company will deliver contestable and non-contestable site-specific developer services work.</li> <li>• <b>Accepted, non-contestable only</b> – the developer has partially accepted the cost advice / quote. A SLP will deliver the contestable site-specific developer services work and the</li> </ul>

Reference	Term	Definition
		<p>incumbent water company will deliver the non-contestable site-specific developer services work.</p> <ul style="list-style-type: none"> <li>• <b>Live</b> – the cost advice / quote is still valid / live but has not yet been accepted.</li> <li>• <b>Expired</b> – the cost advice / quote has since expired.</li> </ul>
2.16	Comment	<ul style="list-style-type: none"> <li>• Please provide any additional comments that you think may be helpful in our analysis (e.g., contaminated land; is excavation through rock or artificial hard material required; etc.). Any factors make the new development 'special' relative to other new developments.</li> </ul>

**Table 3: Wholesale Water Network+ – SLPs and NAVs competing in incumbent region during the 12 months from 1 April 2020 to 31 March 2021**

Reference	Term	Definition
3.01	SLP or NAV name	The name of the SLP or NAV competing for contestable developer services work.
3.02	SLP or NAV?	Please select from the drop-down list whether the third party market participant is a SLP or NAV.
3.03	Connections (if known)	Total number of new service connections between a property (or properties) and a new /existing water main that are made by the SLP / NAV in the reporting period (if known).
3.04	Properties connected (if known)	Total number of new households and non-households connected to the network by the SLP/NAV in the reporting period (if known).
3.05	Length of mains (m) laid by the SLP and vested/adopted by the incumbent (if applicable/known)	Total length (m) of new water mains laid by the SLP and vested/adopted by the incumbent in the reporting period (if applicable/known) (m).
3.06	Length of mains (m) laid by the NAV (if applicable/known)	Total length (m) of new water mains laid by the NAV in the reporting period (if applicable/known).
3.07	Estimated number of years participating in incumbent region	Estimated number of years the SLP/NAV has been competing for contestable developer services work in the incumbent region (e.g., number of consecutive years the SLP/NAV has been awarded contestable developer services work).
3.08	Comments	Please provide any additional comments that you think may be helpful.

**Table 4: Wholesale Wastewater Network+ – Developer services projects/phases completed in the 12 months from 1 April 2020 to 31 March 2021**

Reference	Term	Definition
4.01	Development description and post code	Please provide a brief description of the new development and post code of the new development (or nearest to).
4.02	Start date	The date new wastewater infrastructure construction commenced at the new development and/or phase of development. A site may have multiple phases, but if one phase is applied and designed for separately, then this should be captured separately in the data request. Completed new development projects / phases that started / commenced within the last 5 years should be captured.
4.03	End date	The date the new development project / phase was financially closed / complete during the 2020-21 financial year. A site may have multiple phases, but if one phase is applied and designed for separately, then this should be captured separately in the data request. Completed new development projects / phases that started / commenced within the last 5 years should be captured.
4.04	Development served by	Select whether the new development is served by the incumbent or a NAV (new appointments and variations). NAVs are appointed water and/or wastewater companies which provide a water and/or sewerage service to customers in an area for which the incumbent (or a predecessor of the incumbent) was previously the appointed water company..
4.05	Services required from the incumbent or third-party provider (SLP or NAV)	Select the services required from the incumbent or third-party provider [SLP (self-lay provider) or NAV] to obtain wastewater services to the new development from the drop-down list: <ul style="list-style-type: none"> <li>• Connection to existing sewer</li> <li>• New sewers and associated connections</li> <li>• New sewers and associated connections; sewer diversion</li> <li>• Connection to existing sewer; sewer diversion</li> </ul> Please choose the category from the drop-down list that is most appropriate for the new development in question. Exclude services that are undertaken by the developer themselves.
4.06	Excavation, backfilling and reinstatement provided by incumbent?	Please state whether excavation, backfilling and reinstatement was provided by the incumbent to the developer. Select 'yes' or 'no' from the drop-down box.
4.07	Traffic management required?	Are costs payable as a result of compliance with the Traffic Management Act 2004? Please select one of the following options from the drop-down list: <ul style="list-style-type: none"> <li>• No</li> <li>• 3 way temporary lights</li> <li>• 4 way temporary lights</li> <li>• Road closure</li> </ul> Other (please describe in comments)
4.08	Household or Non-Household?	Please select whether the new development is intended to be used for household or non-household purposes from the drop-down list, or a mix of household and non-household. Household means any premises used principally as a domestic dwelling or intended for such use, such as a house or flat.

Reference	Term	Definition
		Non-household means any premises being used principally for industrial, business, recreational or community purposes and not as a dwelling, or intended for such use.
4.09	Properties connected – incumbent	<p><b>Total number of new properties (household and non-household)</b> added to the network at project/phase financial close, that are <b>served by the incumbent and where the service connections were made by the incumbent.</b></p> <p>This should:</p> <ul style="list-style-type: none"> <li>• exclude the number of new properties served by the incumbent but where the service connections were made by a developer/SLP (4.10); and</li> <li>• exclude the number of new properties served by a NAV (4.11).</li> </ul> <p>For avoidance of doubt, a group of properties supplied by a single connection should be counted as several properties. They should only be treated as a single property if a single bill covers the entire property.</p>
4.10	Properties connected – developer or SLP	<p><b>Total number of new properties (household and non-household)</b> added to the network at project/phase financial close, that are <b>served by the incumbent but where the service connections were made by a developer/SLP.</b></p> <p>This should:</p> <ul style="list-style-type: none"> <li>• exclude the number of new properties served by the incumbent and where the service connections were made by the incumbent (4.09); and</li> <li>• exclude the number of new properties served by a NAV (4.11).</li> </ul> <p>For avoidance of doubt, a group of properties supplied by a single connection should be counted as several properties. They should only be treated as a single property if a single bill covers the entire property.</p>
4.11	Properties connected – NAV	<p><b>Total number of new properties (household and non-household)</b> added to the network at project/phase financial close, that are <b>served by a NAV</b> (if known).</p> <p>This should:</p> <ul style="list-style-type: none"> <li>• exclude the number of new properties served by the incumbent and where the service connections were made by the incumbent (4.09); and</li> <li>• exclude the number of new properties served by the incumbent but where the service connections were made by a SLP (4.10).</li> </ul> <p>For avoidance of doubt, a group of properties supplied by a single connection should be counted as several properties. They should only be treated as a single property if a single bill covers the entire property.</p>
4.12	Length of sewers laid by incumbent (m)	Total length (m) of new sewers laid by the incumbent at project/phase financial close.
4.13	Length of sewers laid by developer or SLP (m)	Total length (m) of new sewers laid by a developer/SLP at project/phase financial close, which the incumbent water company adopts.
4.14	Length of sewers laid by NAV (m)	Total length (m) of new sewers laid by a NAV at project/phase financial close (if known).

Reference	Term	Definition
4.15	Approx. percentage of contestable work undertaken by incumbent	<p>Select the approximate percentage of contestable developer services work undertaken by the incumbent wastewater company from the drop-down list:</p> <ul style="list-style-type: none"> <li>• 0% - 10%</li> <li>• 10% - 20%</li> <li>• 20% - 30%</li> <li>• 30% - 40%</li> <li>• 40% - 50%</li> <li>• 50% - 60%</li> <li>• 60% - 70%</li> <li>• 70% - 80%</li> <li>• 80% - 90%</li> <li>• 90% - 100%</li> </ul> <p>This could be based on the proportion of new sewers laid by the incumbent wastewater company or something similar. This could include appropriate weighting for example by the amount of pipework on on-site or off-site. Please outline in accompanying commentary on the calculations / assumptions applied.</p>
4.16	Approx. percentage of contestable work undertaken by developer/SLP	<p>Select the approximate percentage of contestable developer services work undertaken by a developer/SLP from the drop-down list:</p> <ul style="list-style-type: none"> <li>• 0% - 10%</li> <li>• 10% - 20%</li> <li>• 20% - 30%</li> <li>• 30% - 40%</li> <li>• 40% - 50%</li> <li>• 50% - 60%</li> <li>• 60% - 70%</li> <li>• 70% - 80%</li> <li>• 80% - 90%</li> <li>• 90% - 100%</li> </ul> <p>This could be based on the proportion of new sewers laid by SLPs or something similar. This could include appropriate weighting for example by the amount of pipework on on-site or off-site. Please outline in accompanying commentary on the calculations / assumptions applied.</p>
4.17	Site-specific construction work (excluding network reinforcement) – gross costs incurred by incumbent (£)	<p><b>Total actual outturn costs incurred by the incumbent</b> wastewater company at <b>project/phase financial close</b> associated with the <b>work on, or provision of, sewerage structures or facilities located on a development as well as work to provide and connect a requested sewer or lateral drain on, to or in the immediate vicinity of, the development.</b></p> <p>Where the developer services project includes any diversionary works, the costs for these works must be included here alongside other site-specific costs (e.g., service connection and sewer requisition). Costs associated with the traffic management act should also be included here.</p> <p>For avoidance of doubt:</p> <ul style="list-style-type: none"> <li>• It does not refer to costs or work required as part of network reinforcement.</li> </ul>

Reference	Term	Definition
		<ul style="list-style-type: none"> <li>Indirect / overhead costs and pre-construction costs, including application and administration fees, should be excluded from this column (4.17) and captured instead in 4.19.</li> <li>The value of adopted assets should be excluded.</li> </ul>
4.18	Site-specific construction work (excluding network reinforcement) – gross revenue received by incumbent (£)	<p><b>Total contributions received by the incumbent</b> wastewater company from developers at <b>project/phase financial close</b> associated with <b>the work on, or provision of, sewerage structures or facilities located on a development as well as work to provide and connect a requested sewer or lateral drain on, to or in the immediate vicinity of, the development.</b></p> <p>Where the developer services project includes any diversionary works, the contributions received for these works must be included here alongside other site-specific contributions (e.g., service connection and mains requisition).</p> <p>For avoidance of doubt:</p> <ul style="list-style-type: none"> <li>Network reinforcement contributions should be excluded.</li> <li>Contributions received by the incumbent wastewater company attributable to Indirect / overhead costs and pre-construction costs, including application and administration fees, should be excluded from this column (4.18) and captured instead in 4.20.</li> <li>Value Added Tax (VAT) should be excluded.</li> <li>Gross revenue should be reported as a positive number and should be reported before the deduction of any discounts (e.g., income offset).</li> </ul>
4.19	Other developer services activities (excluding network reinforcement) – gross costs incurred by incumbent (£)	<p><b>Total actual outturn costs incurred by the incumbent</b> wastewater company at <b>project/phase financial close</b> associated with <b>other developer services activities not captured in site-specific work (4.17). For example, indirect / overhead developer services costs and pre-construction costs, including application and administration fees.</b></p> <p>For avoidance of doubt:</p> <ul style="list-style-type: none"> <li>Network reinforcement costs should be excluded.</li> <li>The value of adopted assets should be excluded.</li> <li>Any costs reported in 4.17 should not be included in 4.19 (i.e., no double counting).</li> </ul>
4.20	Other developer services activities (excluding network reinforcement) – gross revenue received by incumbent (£)	<p><b>Total gross contributions received by the incumbent</b> wastewater company at <b>project/phase financial close</b> associated with <b>other developer services activities not captured in site-specific work (4.18). For example, indirect / overhead developer services costs, including application and administration fees.</b></p> <p>For avoidance of doubt:</p> <ul style="list-style-type: none"> <li>Network reinforcement contributions should be excluded.</li> <li>Any contributions reported in 4.18 should not be included in 4.20 (i.e., no double counting).</li> <li>Value Added Tax (VAT) should be excluded.</li> <li>Gross revenue should be reported as a positive number and should be reported before the deduction of any discounts (e.g., income offset).</li> </ul>
4.21	Comments	Please provide any additional comments that you think may be helpful in our analysis. Any factors make the new development 'special' relative to other new developments.

**Ofwat (The Water Services Regulation Authority)  
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