
Appendix C

Reference Documents

Reference documents for the Flourishing Market Roadmap

The following documents are referenced within the Flourishing Market Roadmap document and have provided input for the Strategic Panel:

- ◆ Water Efficiency workstreams and reports. Sources include:
 - The Retailer Wholesaler Group (RWG) Water Efficiency Sub-Group's [NHH water efficiency survey](#) results (Nov 21)
 - MOSL's [Water Efficiency](#) landscape Strategic Panel paper (SP06_03 presented on 13 Jul 22)
 - The RWG Water Efficiency Sub-Group's [Water Efficiency report](#) (Apr 22)
- ◆ The Strategic Panel's [Priority Outcomes](#) in which the Strategic Panel committed to the development of a competitive market (Sep 22)
 - MOSL's Business Improvement programs: The Strategic Metering Review's [Interim Metering Strategy](#)
- ◆ Recent Market regime changes
 - Defra's Non Household (NHH) demand reduction [target](#),
 - Defra's [Environment Improvement Plan](#) (EIP) (January 2023) and subsequent [Plan for Water](#) (April 2023)
 - Changes to the [Retail Exit Code](#) for allowed charges and caps

◆ Customer feedback:

- Customers' feedback from [CEO Forum](#) (Nov 19)
- MOSL Customer persona [models](#) (Oct 22)
 - [Newsagent](#)
 - [Spar](#)
 - [Oil refinery](#)
 - [Golf course](#)
 - [Environmental body](#)
 - [Small/medium retailer](#)
- CCW/ Blue Marble [Synthesis report](#) (Jan 23)
- CCW [Five- year review](#) (Mar 23).

◆ Market behaviours, dimensions, and performance:

- Ofwat's Review of incumbent company support for effective markets [RISE report](#) (Aug 20)
- Rachel Fletcher's [vision for Ofwat](#) presented at the CEO Forum (Nov 20)
- Ofwat's annual State of the Market reports
 - Year 1 : <https://www.ofwat.gov.uk/regulated-companies/markets/business-retail-market/open-for-business/>
 - Year 2 : <https://www.ofwat.gov.uk/publication/state-of-the-market-2018-19-review-of-the-second-year-of-the-business-retail-water-market/>
 - Year 3 : <https://www.ofwat.gov.uk/regulated-companies/markets/business-retail-market/state-of-the-market-2019-20-review-of-the-third-year-of-the-business-retail-water-market/>
 - Year 4 : <https://www.ofwat.gov.uk/regulated-companies/markets/business-retail-market/state-of-the-market-2020-21-review-of-the-fourth-year-of-the-business-retail-water-market/>
 - Year 5 : <https://www.ofwat.gov.uk/regulated-companies/markets/business-retail-market/five-years-open-for-business-taking-stock-review-of-the-fifth-year-of-the-business-retail-water-market-2021-22/>
- MOSL performance and market insight [dashboards](#).

◆ Initiatives to improve current market state

This section references the initiatives that are in progress which are addressing identified pain points in the market. It also outlines those initiatives which potentially will progress the market in a desired direction or indicate where resources and focus are needed to advance the market.

National Metering Strategy

- Rollout of smart technology
- Ownership of reads
- Meter replacement

Data Assurance Program

- Eligibility
- Premises data accuracy
- Customer data accuracy
- Segmentation

Water Efficiency

- Benchmarking
- Incentives
- Awareness
- Solutions

Wholesaler Tariff simplification

- Standardization
- Volume
- complexity

Bilateral transaction hub

- Market frictions
- Simplify processes
- Better customer experience

Market Performance Framework

- Delivering improved customer outcomes
- Fair
- Proportionate