
Roadmap to a Flourishing Market - Appendix C

Reference Documents

Reference documents for the Roadmap to a Flourishing Market

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