



NORTHUMBRIAN
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SHAPING OUR FUTURE 2018-40

DELIVERING OUR CUSTOMERS' PRIORITIES
TODAY AND TOMORROW

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WELCOME

Welcome to our future vision statement. This document sets out how we plan to build on our strengths and develop further as a customer focused business in order to anticipate, respond to and exceed our customers' expectations in the future.

We live in a fast changing world, with new technologies that are shaping how we relate to the world and to each other, rising customer expectations, a sharp focus on the world's finite resources, and a wide range of other external factors that we as a company must be ready to manage – from economic pressures to extreme weather events.

We have our own ambitions too as to how we will deliver unrivalled customer service and experiences in the future. Change brings new and exciting opportunities, which we want to use to make positive impacts both on the services we provide and the productivity of our operations.

The essence of our response to the challenges of the future – some of which we cannot yet know about – is to have the right characteristics in place as a business. This means we must be innovative, agile, curious and collaborative, and we need to have the very best relationships with many wide-ranging partners. We must also make sure that our workforce is not only ready for change, but leads and contributes to the process.

In developing this vision statement we have talked to customers, partners, stakeholders, and our employees about where they see the future – not just for Northumbrian Water Group but for the water sector as a whole, and indeed for any company such as ours that is delivering customer service.

We have incorporated the views that emerged through the very large number of workshops and design sprints we hold (sprints are collaborative, fast-paced events that focus on solutions) in addition to our extensive customer research and participation activities, ongoing dialogue with customers and of course our hugely successful and world leading Innovation Festival.

We have also recently formalised the involvement of individual members of the Board in championing particular aspects of the business. So for example Margaret Fay acts as our customer champion and Dr Simon Lyster our environmental champion. This close involvement includes attending workshops and co-creation sessions to hear first-hand the views of customers as we develop our proposals.

We will take the opportunity to test this vision statement with customers and to feed their views into our business plan for 2020-25 and beyond, which we will publish later this year.

We know that looking ahead and planning well pays off. Our investment in the Abberton Reservoir, for example, which was completed in 2015, secured water supplies for many years to come in one of the driest parts of the country. But this isn't just about the 'nuts and bolts' of water and wastewater services. So much of what we do is about our relationships with customers, their experiences of our services, and our ambitions to make a real difference, for the better, to their lives.

This is really important to us; not just because we provide services that are essential to people, their well-being and the environment, but because it is by meeting the challenges of tomorrow effectively that we maintain the trust of our customers and continue to have legitimacy in their eyes in the years to come.

Heidi



Heidi Mottram OBE
Chief Executive Officer

Andrew



Andrew Hunter
Chairman, on behalf of the Board

The vision has been shaped by conversations with customers, our Water Forums, our partners, other stakeholders and our Board.

In particular we have:

- Talked to customers about the issues that are most important to them and how they think we should respond to future challenges.
- Incorporated the views and responded to challenges from the Water Forums (our Customer Challenge Groups).
- Carried out workshops and strategy development sessions with our Executive Leadership Team.
- Debated and discussed as part of a review by members of the Northumbrian Water Group Board.

WATER FORUMS STATEMENT

I welcome this document which is a very tangible manifestation of Northumbrian Water's commitment to understand and act on its customers' requirements and concerns. While it is simple in principle to include customer perspectives in a strategy, in practice this is also a very complex task.

The company serves a very diverse and large community across an equally diverse geographical area, from remote rural uplands to the fast-growing margins of the capital city. The communities that rely on Northumbrian Water Group for water supply or wastewater services are diverse and fast-changing, which is why a comprehensive approach to understanding customers is needed and why this strategy matters. Customers are right to ask for higher performance and standards from a utility and it is a pre-requisite of that, that their voice is heard by decision-makers. It is also why the Water Forums exist.

The Water Forums were created to give as wide a range of customers a voice as possible in the decisions taken by the company. By appointing people with knowledge of rural and urban areas, business and communities, customer service and the natural environment, we seek to inform our work by a diverse and expert group of people. These expert representatives have been given high levels of access to the programmes and employees of Northumbrian Water Group to make sure customers are at the heart of important decisions. Central to this shared work has been a comprehensive programme of engaging with customers over long-term priorities and decisions. This document explains the outcome of these many engagement events.

This strategy sets out Northumbrian Water Group's priorities in six areas. In each of these areas, the Water Forums have engaged in discussions and we feel we have had a real influence over the intent, content and emphasis. The company has listened where we have spoken. For example, we are strongly supportive of the aspiration to work towards zero water poverty. We have asked the company to develop a detailed delivery plan and it has committed to such a plan in this strategy. The Forums have also asked that greater focus is put into identifying and managing leaks and we will continue to scrutinise the company's performance here. And the Forums have asked for greater emphasis and precision on targets for improving the environment and we are pleased that this strategy commits the company to more partnership working to achieve better actions and effect. These are just some of the ways in which dialogue between the Water Forums and Northumbrian Water Group is delivering better outcomes for customers.



Jim Dixon
Chair of the Water Forums





MEETING CUSTOMER PRIORITIES IN A CHANGING WORLD

Northumbrian Water Group serves 2 million households in its two operating regions covered by Essex & Suffolk Water and Northumbrian Water. We aim to meet and exceed our customers' expectations both now and in future. In order to be able to do this, we must make sure we are prepared for what might come.



We have an ongoing process in place to scan the horizon, assess risks and anticipate the future through our own analysis and our work with businesses, innovators, academics and other experts. We make sure that we bring all of these threads together, so that we are looking at the full picture when we make decisions.

Our forward planning is informed by a framework that we use to categorise and analyse political, economic, social, technological, environmental and legislative trends and developments that may impact on our business. The approach is summarised in the appendix on page 38.

We use co-creation and customer participation as a key tool when designing solutions. Our recent report, 'From customer consultation to a culture of customer participation' sets out the journey we are on in this area, highlighting the creative and innovative solutions that have emerged and explaining our ambitious plans to take this further over the coming years.

Above and beyond our ongoing process to look ahead we also understand the value of taking time to review the challenges we face, the way in which customer priorities and experiences may be evolving, and our response as a business. Much of what is contained in this vision statement builds on our 'Future Horizons' document, which we published in 2014 and which informed both our plans for 2015-20 and the ongoing development of service policy.

Our conversations with customers have identified their priorities for us as a business, and this document is structured around those priorities. Each section also explains our ambitions and long-term approach in those areas:

- Unrivalled customer experience
- Affordable and inclusive services
- Leading in innovation
- Reliable and resilient services
- Working with others to improve the environment
- Building successful economies in our regions.

In responding to customer priorities and delivering our services we are committed to taking an integrated approach. This means adopting a joined-up approach across the water cycle, whereby we integrate our business decisions and activities and think beyond traditional silos. Working in this way allows us to be more resilient and sustainable as a business and to deliver services at a lower cost. It might involve, for example, engaging with customers to manage their water and wastewater issues in a more holistic way – taking the opportunity at a single interaction to provide advice to customers on how they can reduce water usage, help keep the network clear, check their connections to the sewer and surface water network (which flows directly to rivers), test their drinking water, and fix a leak or blockage.

UNRIVALLED CUSTOMER EXPERIENCE

We have a clear long-term vision to be regarded by our customers as the best customer service provider they experience. Customers have told us that they rate the likes of Amazon, John Lewis, Premier Inn and Apple as exemplar service providers for different reasons. We welcome this challenge and in 2015 we worked with customers to co-create the key components of our customer service strategy, which is to deliver an 'Unrivalled Customer Experience'.



Against this backdrop we know that customers' expectations are increasing all the time, in part as a result of the choice and immediacy that technology provides. With social and mobile technology at their fingertips, customers' expectations now are that they should be able to do what they want to do, when they want to do it, and with the greatest of ease.

Customers' expectations of us are changing too. Our extensive research and engagement indicates that customers are now less interested in aspects of the delivery of water and wastewater services, which they consider to be a core offering. But there are other areas where customers are looking to have much more say and influence, such as customer service, value for money and trust.

In relation to the notion of trust, our customer research shows that this is built through personal connections, positive experiences and receiving a good personal service that is suited to customers' needs. Wider issues such as corporate social responsibility and our impact on the environment are important too. This shift in customer expectations is a marked change, and one that is likely to grow in importance over time.

We believe that we are in a strong position to build on the high levels of trust that our customers have in us. In 2016-17 our customer service performance was ranked as industry leading and we are pleased that the Consumer Council for Water (CCWater) has ranked us as the most trusted water company over the past three years, and in December 2017 we were awarded 'Utility of the Year' for our 'all round, consistent outperformance'.

Finally by 2025, our customer base will comprise five generations, each with different hopes, ideas and priorities that have been shaped by the world they grew up in. We work with customers and with leading trend forecasting agencies to forecast their future needs and goals, and make sure that in response we are proactive and innovative in designing our services.

#livingwaterlovingcustomers

UNRIVALLED CUSTOMER EXPERIENCE

OUR LONG-TERM APPROACH

Give greater control to customers in decision making

Our ambition is that by 2025 at least 2 million customers will engage with us and together with communities will be actively participating in their services each year. It is by being able to shape services that customers will feel a greater connection and that trust will be engendered.

The guiding principle that customers are at the heart of our business has directed all that we do as a company over many years, including the way in which we have consulted with customers and taken their views into account. But in the past few years we have been taking these interactions with customers further – moving from consulting and listening, to something deeper and more meaningful.

We have seen the benefits that flow from this approach, giving customers not only a say, but also a greater sense of control. This sense is key we feel to the sector maintaining its legitimacy in the long term. Importantly, the process itself helps cement the emotional and cultural connection between company and customer, leaving customers with a much stronger sense of ownership of their services and of the value of water for their everyday lives.

While we are well along the way in the journey of customer participation, we plan to build on this much further. Our customer participation report, which was

published in December 2017, set out our ambitions in this area. We are seeking to achieve the most deeply engaged and participative customers in the industry.

As part of our commitment to generating active participation, we are pledging to develop 'collaborative communities'. We are aiming to involve millions of customers, and will make sure that customers who actively participate through this initiative are broadly representative of the diversity of people we serve.

Both individual and collaborative community input will be included in our participation activities and targets. An important element of this initiative is to collaborate with other service providers – giving our customers and communities a more joined up service offering of water, health, multi-utility and lifestyle choices.

Finally, we understand that communities encompass not only communities in the traditional sense but also communities of interest. We plan to use digital channels to support those groups and to appoint a customer and community collaboration lead to work in partnership with them.

Use technology and data to help us develop deeper relationships with our customers

Our aim is to embrace all opportunities to make use of the insight that comes from technology, data and data science to develop closer relationships with our customers. This insight will allow us to anticipate an individual customer's needs, offer services that are

most relevant to them and provide additional support for any customers who move into circumstances that mean they might need extra help. New technology and data will also allow us to offer faster, often real-time responses to what may be complex enquiries and problems. The digital experience must be intuitive, engaging and easy to interact with.

All of our customers should be able to communicate through multiple different channels and enjoy a seamless experience across all of them, including those customers who do not wish, or are unable, to use digital channels. Naturally we will ensure that data is completely secure and is only used in the way that customers want it to be used.

We have invested in state of the art digital solutions, including a new customer contact and billing system that we are currently putting in place across the business (see case study opposite). At the same time we are making the cultural transformations that will be necessary to allow our people to use digital channels to inform their relationships with customers.

We are also exploring greater use of artificial intelligence (AI) and of other technological developments, such as the rise of voice based user experience and digital assistants (such as Alexa and Siri). Many customers will look to these features as their primary way to interact with us. Similarly 'bot technologies' will enable us to create richer natural language interactions between us and our customers. As part of our service response we will continue to

CASE STUDIES

empower our employees so that they are free to offer more flexible and creative solutions for customers, again based on an understanding of that individual customer's needs.

Working with other businesses to provide wide-ranging services

We work in partnership with a very wide range of other businesses, and these links give us access to a considerable amount of expertise relating to areas such as retail, energy and logistics.

We share good practice and ideas with these businesses and are always looking for opportunities to collaborate to support the delivery of our ambitions for customers in the long term. For example we are currently exploring ways in which we can work with these companies as part of a proposal to provide multi-management packages in customers' homes – making life simpler for our customers and potentially saving them money by providing a more joined up service offering of water, health, multi-utility and lifestyle choices.

Raise awareness and understanding

A key part of maintaining trust is the efforts we make to increase customer awareness and understanding of the services we provide, as this is an important factor in perception of value for money.

Our ambition is to raise awareness and our approach to customer participation and collaboration directly supports that goal.

Extending the Water Rangers initiative

The Water Rangers initiative involves volunteers from local communities monitoring routes next to streams, becks, burns and bathing waters that are vulnerable to pollution across the North East.

The Rangers look out for suspected pollution and report their findings so that any potential issues can be dealt with quickly and any impacts on the environment and wildlife are kept to a minimum. Rangers also report on third party issues such as fly tipping, fallen trees, abandoned shopping trolleys and missing life buoys so this information can be passed on to the relevant authorities to take action. In this way members of the community are part of the solution when it comes to maintaining water quality.

Since the initiative was launched in 2014, more than 3,100 patrols have been completed by volunteers, with over 180 issues reported. Encouragingly, three-quarters of the original volunteers are still involved. Partnership working with organisations such as the region's rivers and wildlife trusts has also expanded and we are continuing to explore cross-volunteering opportunities to support one another.

It is our intention to build on this excellent example of frontiership in customer participation in the future by extending the scheme so that there are Water Rangers in all of our communities.

Investing in our customer contact systems

To make sure that we are ready to respond to customers' future expectations we are investing £24 million in our new customer experience programme. This represents the largest investment we have ever made of this nature and will mean that we have a single view of each individual customer (so we will be able to respond faster and with greater consistency), all of our conversations with them will be in one place, and they will enjoy a seamless experience whichever channel they choose to use.

Armed with a full picture of each customer we will be able to provide a much more personal service, tailored to their individual circumstances.

As well as transforming the business through developing our technology, we have focused on developing our people, helping them to become ready for change and equipping them with the skills they need to continue to deliver unrivalled service.

We will be fully operational across all platforms by the end of this year. An important aspect of the technology that we have put in place is to make sure that it is future proof. So we will be able to develop our systems in response to customer expectations and needs – such as the move towards voice activated technology and digital assistants.

AFFORDABLE AND INCLUSIVE SERVICES

We recognise that some of our customers face real difficulties in affording essential necessities, including water and wastewater services, and that this is likely to be a continuing problem. Customers also tell us they would like choice over how and when they pay their bills.



In general, incomes have stagnated since 2008, and welfare reform threatens to impact on some households. And in some parts of the regions that we serve there are very high levels of unemployment, benefits receipt and income deprivation.

A high proportion of our customers are served by us for many years and through differing personal circumstances; our research has shown that, at any one time, around half of our customers are likely to be facing, at the least, one situation that could lead them to experience circumstances in their lifetime where extra support would help. That help could be ongoing or temporary.

OUR LONG-TERM APPROACH

Towards zero water poverty

Our ambition is to achieve zero water poverty (which is where more than 3% of household income is spent on water bills) by 2030. In our view there is no reason why, in the 21st Century, customers should be in a position where a water bill is unaffordable. We will do this by carrying out a sophisticated, ongoing and wide-ranging plan of initiatives between now and 2030 to move customers out of poverty. We will also continue to develop our tariffs and charging approach to maximise the number of customers we can support and will make sure that we offer flexible and supportive approaches to charging.

We will continue to work closely with those in the free advice sector, including StepChange and the Money Advice Trust, and with other utility companies to jointly promote and align how we support customers who need extra help.

We will carry on the collaborative working we do with other complementary organisations such as National Energy Action to combine our resources and efforts and deliver a more comprehensive service to customers. This will make it easier for customers to access services that support them to a zero poverty position across all of their essential utilities.

Of course, we will also push to keep bills as low as possible by being efficient and innovative. Working in partnership with others and taking an integrated approach can help us deliver multiple benefits in a more affordable way too.

A strategy of inclusivity

Our ambition is to provide an unrivalled experience for every single one of our customers. While we are already delivering unrivalled service to the majority of our customers, there are some who are not being reached because of their personal circumstances – this may be because of their overall life situation, personal characteristics or due to broader market and economic factors.

We will shortly publish our 'Customer inclusivity strategy for everyone' which will set out our nine areas of focus to help us make sure that the service we provide to customers who need extra help is exceptional. These areas include proactively offering additional support when customers need it, providing personalised communication to customers, and working in partnership with financial, health and community support organisations as well as with other utility providers.

CASE STUDY

Providing support to customers when they need it

In an industry-first partnership, we have teamed up with StepChange Debt Charity to offer customers free, confidential debt advice and support. As the UK's largest debt charity, StepChange is a natural partner to entrust with such important and often sensitive matters for our customers.

Working together in this way we are better able to understand each customer's financial situation and create the right opportunities for customers to work with the charity and agree an action plan. The partnership runs alongside a range of support that is available directly through our team, such as short-term payment plans and budget plans.

LEADING IN INNOVATION

We recognise that to achieve our business priorities we must innovate continually. We have been innovators for a long time; our work to recover energy from all of our wastewater is a stand out example of this, as is our systematic use of ice to clean out trunk water mains (a much quicker and cheaper way to do the job and one that has now been adopted by others in the sector).



Innovation has an important role for us as a business in helping us resolve the potential tension between delivering an unrivalled customer experience, ensuring resilience, protecting and enhancing the environment and delivering infrastructure to support growth – all while making sure that bills are affordable for customers.

Quite simply, innovation enables us to deliver more for less. Our customers rightly compare us to other service providers and expect the same standard of service and to be able to exercise choice. They want to do business with us when and where they choose. Our assets are becoming smarter every day. The modern equipment we buy generates vast amounts of information with many different types of sensors now economically feasible. All of this means we can run more efficient and resilient networks.

OUR LONG-TERM APPROACH

Ambition to be leading

Our ambition is to be leading in innovation – both within and beyond the water sector.

Leading in innovation means we understand our own business needs and the potential benefit for our customers and other stakeholders; and that leaders and line managers ensure that their teams have clear innovation objectives, and the capacity to achieve them. It means our people are instinctively curious and are empowered to try new approaches, and that everyone is encouraged and supported to implement new ideas and ways of working.

Leading in innovation means we build sustainable strategic partnerships to support our innovation priorities; and that we are inspired by ideas and stories from other businesses and sectors, such as life sciences, creative arts, digital, manufacturing, farming and food production.

Our innovation strategy

As part of our strategic approach, we have been targeting areas where a step change in performance is required. We have applied the design sprint approach to enable us to break new ground, push the boundaries of what might be possible, and to think big. Alongside our sprints we hold 'data hacks', where a data science approach is used to generate insights from large amounts of data, through the application of statistical analysis and more automated processes such as machine learning.

We recognise the role that our people have in bringing forward great ideas, challenging the norm and having the confidence to propose new ways of working. We support this through our innovation culture and by investing in helping people to be creative and entrepreneurial.

These approaches complement our incremental and continuous improvement and allow us to rapidly develop, prototype, test, refine and implement solutions. Their success has been demonstrated by the numerous innovative and cost-effective ideas that have emerged and which we as a business have been able to implement.

Sprints and data hacks, along with creative problem solving, open innovation, horizon scanning,

technology transfer and academic research are a key part of our innovation 'ecosystem'. We plan to continually grow this ecosystem by investing in new capabilities, in particular to build up our engagement with smaller companies.

Innovation partnerships

We are at our most innovative when we combine our people and ideas with those from the outside world. We have built strong relationships with a range of organisations and individuals and have put in place agreements whereby we give unique access to our business operations and the types of problems that we face; in return they give us early sight of their latest thinking and product developments. Some examples include partnerships with:

- IBM to explore developments in AI, cognitive computing, cloud, cyber security and other areas that are of interest to our business.
- O2 to explore the exploitation of new devices, leading-edge communication protocols and emerging services (such as autonomous vehicles).
- Reece Innovation to develop ideas that require engineering expertise around, for example, acoustic leak detection and rapid screening for blockages in sewer networks.
- Durham and Newcastle Universities to explore developments in, for example, the earth sciences, biology, energy, data science, smart networks and advanced flooding models.

LEADING IN INNOVATION

Innovation Festivals

Following the success of our first innovation festival in the summer of 2017 we are committed to making this an annual event. At the festivals we work with major global and national innovators, and with members of the public, partners and other stakeholders to tackle key problems in a true festival environment.

The 2017 festival drew in 1,000 people from 140 organisations and generated 997 ideas, of which 34 are now being progressed. For example, we plan to introduce the first 'moss trees' in England, installed in Newcastle City centre. Moss trees are man-made structures covered with thousands of moss plants and are designed to absorb pollution in urban areas. Another example is the work we have been doing since the festival with Durham University, trialling the use of mineral and organic by-products from water treatment to alter soil structure so that it holds water for longer. This means rather than rainwater running straight off the land it is retained and then slowly released into water courses and sewers.

Innovation Panel

To challenge and support us in our journey to be leading in innovation we have established an Innovation Panel. The panel is made up of experts from inside and outside of the industry. From outside the industry we have appointed renowned innovators from companies such as Amazon, Apple, IBM and Compare the Market. Their job is to review our plan with the following questions in mind:

- "If my company was putting together this plan, I would consider it to be at the frontier of innovation if it included the following capabilities..."
- "The types of values, behaviours and ways of working I expect my critical service providers to demonstrate are..."

The panel has already started its review role, undertaking scrutiny and challenge of our draft Business Plan strategies and proposals.

CASE STUDIES

Invest Quest

Last year we launched our 'Invest Quest' initiative, a Dragon's Den-style opportunity for employees to bring forward great ideas to help us to work smarter. We identified five projects that we are now taking forward, supported by investment of up to £1 million. They include using technology in a new way to give us better management information that helps us prioritise investment at our service reservoirs, and introducing a modification to the treatment process at one of our largest sites, Bran Sands. The investment we make will pay for itself within a 1-2 year period and will bring sustained efficiencies of £1 million a year after that. We plan to continue the initiative into the future and are currently assessing employees' ideas for the next series.

Building Information Modelling

Building Information Modelling is a process by which assets are defined in a standard way and in digital form. Promoted by government, the approach will ultimately allow more effective and efficient maintenance (both planned and reactive).

We are playing a leading role in promoting Building Information Modelling in the water industry. We pioneered its application in sewer networks, demonstrating the concept at city scale through a collaborative project with the University of Northumbria. Working with our suppliers and other industry stakeholders it is our intention to progressively increase and improve the data we hold in relation to our asset base. Services will become more reliable as a result, and operational costs will fall.



RELIABLE AND RESILIENT SERVICES

Customers tell us they expect us to be responsible and trustworthy custodians of their water and wastewater services, now and in future. They also believe we should be prepared for unexpected events and responsive when they occur.



Customer perception of the resilience of our services is an important element of their overall levels of trust. Significant events will impact on the level of trust that customers have with us, and they expect us to manage risks effectively, having taken all reasonable steps to plan ahead and be prepared. This is a complex area, which touches on the interplays between risks, impacts, asset health and long-term affordability.

In general, resilience for customers means a strong, reliable service that will stand the test of time, cope with change and bounce back from difficult situations. Customers also expect us to undertake preventative measures such as investing in infrastructure and new technologies. In the main, customers accept that there will always be risks of long-term service failure and they expect us to understand and manage those risks as far as is reasonable and affordable to customers.

The concept of resilience is not necessarily one that is familiar to customers and views about what it means can vary greatly. We have to make sure that when asking customers for their views we communicate plainly and simply, so that customers can make fully informed decisions about: the risks, the consequences of disruptions to our systems and services; the range of mitigation options; and the value for money provided by the approaches that we take.

OUR LONG-TERM APPROACH

Our resilience framework

Our ambition is to be expert at mitigating and avoiding any issues that could impact on our customers' experience of our services before they happen.

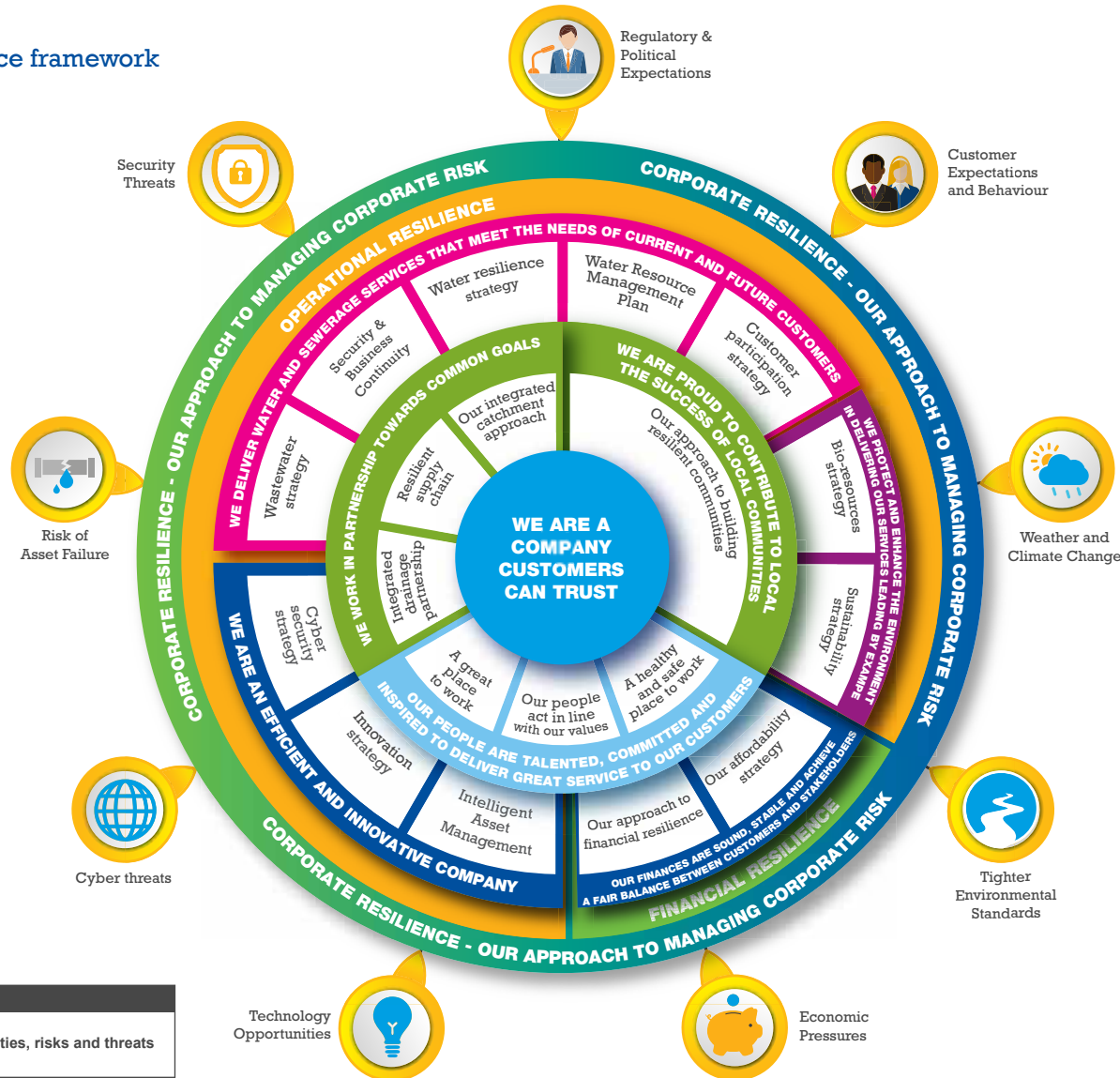
To make sure that we are in a strong position in the future we have developed a Resilience Framework. We use the framework to identify our critical assets and to prioritise investment so that we can continue to deliver resilient services to customers.

The framework demonstrates the interdependency of 20 separate business areas, encompassing operational, financial and corporate resilience. We use the framework to understand risks and to assess our options to respond to and manage those risks. We also use risk and impact reduction as an indicator of improved resilience above the levels that customers have now.

Our approach to resilience is in part based on our understanding of risk, which in turn is informed by our risk register. As we deliver increased system and service resilience we expect to see a corresponding reduction in our 'managed risk' score within the register. This provides assurance to customers and our shareholders that we understand where our risks exist and are developing appropriate strategies to manage this effectively.

RELIABLE AND RESILIENT SERVICES

Our resilience framework



Resilient core services now and tomorrow

Customers have told us that they trust us to get it right when it comes to providing core services. However, we recognise that customer expectations are rising and that we must continually challenge ourselves to ensure that we deliver resilient core services now and in future.

Clean, clear drinking water

Providing excellent drinking water quality and protecting public health are core to what we do. While our performance in this area has improved over recent years, we recognise that this continues to be an area of particular focus for us.

We are putting in place robust plans that will stand us in good stead for the future and are currently preparing our long-term water quality strategy, which will be finalised alongside our business plan later this year.

This includes increased investment at our water treatment works to protect against issues such as pesticides and turbidity. We are also putting plans in place to make sure that our networks are more closely integrated; this initiative will increase the flexibility we have to manage our resources and maintain quality, and will provide greater resilience to any unforeseen events. We will also continue to protect our raw water resources through the strong partnerships that we have.

As an example of us looking outside our own sector and borrowing good practice in the area of water quality we are rolling out a large-scale programme to reposition our treatment works as 'food factories' (see case study opposite).

CASE STUDY

A reliable and sufficient supply of water

By planning ahead we have ensured that we have secure long-term water resources today and in future. Our plans stretch to 2060. This is in spite of the challenges faced in our Essex & Suffolk region in particular, which is located in some of the driest areas of the country. For example, we invested £150 million to extend our Abberton Reservoir (see case study, overleaf).

We are industry leading when it comes to the fewest number of supply interruptions and customers in both of our regions can be reassured that we have 100% security of supply.

We have shown that we are willing to share our water resources for the benefit of water companies in other parts of the country that have supply deficits. We also remain open to considering resource sharing in future. We are active participants in Water Resources East and Water Resources North, working in partnership with other water companies to plan the best use of water resources for long-term supply.

When it comes to ensuring the sustainable use of water we are acknowledged to be one of the leading companies in our approach to water efficiency and water conservation and will continue our efforts to engage with customers, as this helps them to save water, energy and money. We will also continue to take direct action to reduce leakage.

Although our position in the area of water supply is strong, we are never complacent. We are currently developing long-term strategic network plans to cover both of our regions. This long-term planning

approach will align with the way in which we already manage our water resources and, in the north of our region, will be the enabler that allows us to create a fully integrated potable water grid system by 2045.

Taking away and treating wastewater

When it comes to treating wastewater, our customers are already benefitting from being served by the most efficient company, as a result of our sludge management strategy and investment in innovative approaches to bio-resources.

We will continue to maintain our asset base into the future through investment in areas such as sewer cleansing, sewage pumping stations and sewer rehabilitation.

We remain committed to reducing the risk of sewer flooding and are adopting a wide range of innovative approaches to achieve this. These include working in partnership to deliver sustainable urban drainage solutions and engaging with communities through our 'Rainwise' approach and other initiatives to raise customer awareness such as our 'Love Your Drain' campaign.

Finally, we are working with the industry to develop a long-term drainage and wastewater planning framework through Water UK's 21st Century Drainage programme. This will encompass all of our current approaches in this area including the award winning Northumbria Integrated Drainage Partnership, and extends further still the Drainage Strategy framework.

Bringing our food factory vision to life

The water that we supply is the most important product that our customers buy. As part of our continual improvement process we have recently developed a 'food factory' vision for our water treatment works. This approach came following visits we made to a number of food manufacturers, including Greggs and Nestle, where we realised that their factory processes were transferable to our water treatment works. We identified a large number of examples of good practice and are now embedding the food factory vision across our water supply teams.

The vision uses a range of tools and techniques such as site scorecards (which demonstrate to all employees the value that they add and show improvements made in safety, quality, delivery and cost), and flash alerts (where any learnings from concerns or near misses are shared to all).

RELIABLE AND RESILIENT SERVICES

CASE STUDY

Abberton Reservoir

We face some significant challenges when it comes to resource sustainability and resilience in a changing climate.

To ensure a resilient supply of water in the driest county in the country in Essex, we have invested £150 million to complete a scheme to expand Abberton Reservoir. Following more than 20 years of investigation, consultation and detailed planning, the reservoir was expanded by 58% to hold an additional 15 billion litres of water and help secure supplies to our 1.5 million customers in Essex for the next 25 years and beyond.

The scheme was a particularly special project as the reservoir is one of the most important habitats for overwintering wildfowl in Europe and is protected as such by international designations.

Our activities to build resilience

There are a number of strands to our long-term approach to building resilience. In particular we make sure that we use partnerships, innovation, technology and customer participation and awareness, where these approaches will deliver greater operational, financial and corporate resilience in an efficient way and in doing so keep bills as low as possible.

We are already in a strong position in all of these areas, and as we outline elsewhere in this document have a clear vision for the future for each of these strands. In addition to these approaches we:

- Set ourselves stretching strategic goals to deliver a reliable and sufficient supply of good quality water to customers and to deal effectively with wastewater.
- Carry out long-term planning to secure sufficient water resources into the future – this is becoming especially important given that the amount of raw water available to us is likely to be less in future years (as a result of factors such as climate change and changes in the amount of water we are permitted or wish to abstract from the environment).
- Carry out strategic assessments of sites that are ‘too critical to fail’, ensuring that appropriate mitigation measures are in place.

- Maintain a fit and healthy asset base into the future through careful maintenance and investment and by drawing on best practice and innovation.
- Use intelligent networks, sophisticated software and data to make sure that we manage our assets and resources in the most efficient ways.
- Ensure sound long-term financial resilience by having a strong, simple capital structure in place, with no securitisation in the regulated business. This is also underpinned by our Board’s commitment to maintaining strong investment grade credit ratings (assessed by independent credit rating agencies Moody’s and Standard and Poor’s), and through the Board’s oversight of our comprehensive risk-management process.
- Monitor our financial obligations over the long term but also maintain a detailed five-year plan that is updated and approved annually by the Board.
- Do all that we can to support our customers’ own financial resilience – by understanding their requirements and making sure we support them through, for example, our zero water poverty ambition and by offering a range of tariffs.
- Make sure that our computer systems and information are secure by focusing on proactive security, data and people (by embedding good cyber security practices throughout the entire business), and by preparing for ‘when’, not ‘if’.

CASE STUDIES

- Make sure that we are fully compliant with all requirements from our regulator in relation to strong governance and assurance – in particular maintaining the 'self-assured' status that we have been awarded and which reflects the robustness of our corporate governance approach.

We have developed a suite of business continuity and business recovery plans to make sure that we are prepared to maintain service and recover normal operation following major incidents. We aim to be the first water company to attain accreditation to the ISO Business Continuity standard in 2018.

We work closely with a range of partners, including other utility providers and Local Resilience Forums, to contribute to the creation of more resilient communities. We also work with environmental stakeholders to develop resilient ecosystems.

Measuring our resilience

Another element of our resilience approach is to investigate the most appropriate and meaningful ways to measure resilience. To that end we are actively engaged in the creation of meaningful resilience metrics, which we will be able to integrate with existing measures and activities.

Saving money through smart software

One of the ways in which we can build resilience is to use sophisticated software to help us manage our resources.

Aquadapt is an energy optimisation software system that allows us to anticipate water demand in real time in each of our supply zones. With this information the software enables us to use the cheapest sources of water and most efficient pump combinations, automatically controlling flows through treatment works, pumping stations and reservoirs.

We were the first water company in Europe to implement this system. We estimate that introducing Aquadapt across the whole company has delivered a sustainable reduction in energy use equivalent to nearly £1 million a year. We have now adapted the software to allow us to undertake planned maintenance activity on our strategic trunk main networks in an automatic way. This activity reduces the risk that customers will receive discoloured water when we make changes in flows in these mains, perhaps as a result of an issue elsewhere in our network. As far as we are aware this is the first time this software has been used for this purpose anywhere.

This is a strong example of our innovation strategy – adopting an existing system or technology so that it delivers further improvements in service for our customers at minimal cost.

Our Intelligent Asset Management (IAM) transformation programme

The way in which we manage and maintain our assets plays a key role in our ability to provide an unrivalled customer experience. We are embarking on a major transformation programme, with investment of more than £25 million, across the business to introduce intelligent asset management. The programme will:

- Enable us to address any inconsistencies in processes across our two regions and between business functions.
- Provide us with better quality, more reliable and readily available data so that we can make better, faster, more proactive decisions about asset maintenance and investment.
- Allow us to make the most of the immense knowledge base of our people and of new technology.

The programme will involve employees across the business and aligns closely with our new customer experience programme (see page 10). Together both initiatives will provide us the information we need to act efficiently, provide a better service and, ultimately, deliver more for less.

WORKING WITH OTHERS TO IMPROVE THE ENVIRONMENT

A photograph of two men in a garden setting. The man on the left is bald and wearing a bright blue jacket. The man on the right is wearing glasses, a dark suit, and a blue tie. They are both looking towards the camera. In the foreground, there are large green plants and a wooden planter box with various flowers like purple pansies and yellow daisies. The background shows a brick building and some trees.

The environment in which we live contributes greatly to the overall quality of life for our customers. As a company we embrace our responsibility to care for the environment, and to protect it and enhance it where we can. We understand that the environment represents our natural capital, which we rely on to deliver our services, and which is essential for building resilience in the face of future pressures.

Our customers have told us that they strongly value the environment, and want us to work closely with others, building on over 25 years of successful partnership working in the environment, to further protect and enhance our catchments, reservoirs, rivers, beaches and coastline wherever possible.

The Government's 25 year plan for the environment sets out a strategy for protecting and enhancing the environment for future generations. We will do our part to support all of the ambitions in the plan, including achieving clean air, clean and plentiful water, thriving plants and wildlife and using resources from nature more sustainably and efficiently. The plan explains that one of the ways in which the goals will be achieved is through 'strengthening leadership and delivery through better local planning and more effective partnerships'. This provides valuable context and support for our own ambition for the environment, which is 'to play our part and demonstrate national leadership in providing an improved, enhanced and sustainable environment to support the needs and aspirations of our regions'.

OUR LONG-TERM APPROACH

Recognising the importance of natural capital

Our ambition is to understand and value nature in our decision making and to protect and enhance natural capital within our catchments, especially where we depend on or interact with it in delivering our services.

As part of our Integrated Approach, joining up planning and delivery of our services across the

water cycle, we will embed the process of taking account of the capitals within the business. This will ensure we consider our impact on the capitals and work to make a positive difference in the renewable and non-renewable environmental resources that we depend on to provide services to our customers.

We first reported on our journey to explore use of the capitals in the 'Our contribution' report we published in August 2017. In that report we committed to continue to explore the most appropriate ways to measure and report on the environmental, social and economic impacts of our activities. We will continue on this journey and develop a plan that will set out ways in which we can work across our business activities and with others to improve and enhance the environment.

Working in partnership in our catchments

Our ambition is to extend our excellent partnership working, actively seeking opportunities to develop even stronger relationships with a very broad range of partners to deliver multiple benefits more affordably and to promote an Integrated Approach. Building on our current partnership successes including the Northumbria Integrated Drainage Partnership, and the Chelmer and Blackwater Partnership, we aim to further strengthen our approach and demonstrate outstanding national leadership in brilliant partnership working.

Working in catchments is an essential part of our business and we already work with many partners and partnerships. Taking a catchment-based approach helps us to work with others, including local

communities and the agricultural sector, to develop effective solutions to deliver multiple benefits for our customers and the environment. These benefits include improving raw water quality, managing the environmental impact of our discharges, reducing the risk of flooding (for example through Natural Flood Management), and improving biodiversity.

Our recent 'Thinking Ahead' workshops explored how we can build on existing partnerships to deliver our shared objectives more effectively. At the workshops we identified a series of themes where there is considerable potential for us to enhance our partnership working in the future.

Delivering and supporting a wide range of environmental improvements

Our ambition is to enhance the environment by going above and beyond our regulatory commitments. We envisage that this will be through taking a catchment approach to planning and service delivery, and by working in partnership with others wherever possible in order to support the delivery of environmental improvements that are important to our customers.

We are developing our strategy for the Wider Environment, which will set out how we will go above and beyond what we must do to improve and enhance the environment, and to provide opportunities for customers to access nature and enjoy recreational activities. This will encompass areas such as energy and emissions, waste and recycling, and biodiversity enhancements, as well as further improvements to the water environment – our rivers, lakes, beaches and coastal waters.

WORKING WITH OTHERS TO IMPROVE THE ENVIRONMENT

We will continue to co-create our wider environment strategy with our partners and customers and will include our proposals on this when we publish our business plan later this year.

CASE STUDIES

River Don Revival

We are members of a partnership that has been working together to identify and tackle a wide range of issues affecting the complex River Don, a tributary of the Tyne.

Despite its industrial past and urban location, the River Don is a special place for wildlife including the water vole, a protected species that has declined dramatically in recent decades. Water quality in certain parts of the river is affected by flooding, pollution from various sources and planned housing and industrial development (which will also put pressure on the catchment's drainage).

The partners agreed to focus attention on the River Don and its tributaries and catchment area. We provided seed funding and the Don Partnership was formed. It has worked with the Local Nature Partnership to produce a shared vision of how the river can be improved to benefit people and the environment. By sharing resources, funding, data and expertise the partnership has been able to look for

opportunities to restore the natural river channel and create habitat as well as bringing other benefits such as better management of flood risk.

Rainwise

'Rainwise' is our surface water management programme where we work with communities and our partners to manage the amount of rainwater that enters the sewer network from roofs, roads and other hard surfaces. This helps reduce the risk of flooding to homes and businesses now and in the future, and protects the environment from pollution.

With our partners we look for opportunities to carry out projects that will remove, store, divert or delay the speed that rainwater enters the sewer network. We install sustainable drainage solutions such as rain gardens and shallow drainage channels wherever we can. So far taking a 'Rainwise' approach has reduced flood risk to more than 4,000 customers and raised awareness of what customers can do to reduce flood risk in their own communities. At the same time the approach has also delivered many wide-ranging environmental benefits for those communities.

We piloted the approach in a number of areas, including at Brunton Park in Newcastle where we worked with the Environment Agency and Newcastle City Council on a jointly funded £7 million flood risk reduction scheme to reduce flood risk at more than 100 properties. We constructed a new river channel, built flood defences and installed storage tanks and

basins. The project was innovative in that it involved co-design of solutions with communities and partners and pooling of funding.

We plan to develop the 'Rainwise' approach further by working with local communities, the Environment Agency and other partners to put in place community pods. These pods will contain equipment specific to the locality's needs and will have many uses in addition to flood risk reduction.



BUILDING SUCCESSFUL ECONOMIES IN OUR REGIONS

As a large business operating across two UK regions we have a clear responsibility and significant opportunities to contribute to the economic well-being of the people we serve. We employ more than 3,000 people, own assets worth many billions of pounds, and in the five-year period from 2015 to 2020 will spend and invest more than £3 billion in providing water and wastewater services. We have a network of more than 2,000 supply chain partners, many of which are based in our regions.



The Natural Capital Committee's reports demonstrate that a strong and valued natural environment is essential for economic growth, and water management plays a key role within this. As a water company we recognise the part we play, and our ambition is to take a leading role in protecting the water environment within our regions.

As a result of the many economic links between our company, our employees and our supply chain, our investment has a 'ripple effect' in the local economy, going far beyond the direct investment through trade with local suppliers and through employment of a large regional workforce. We know that our customers strongly support our investing with local suppliers.

Although our operating areas face different challenges and opportunities in terms of growth, the manufacturing sectors of both will continue to depend on access to plentiful water resources, as will the agricultural sector, particularly in East Anglia where it is a key part of the economy. As demand increases as a result of population growth and environmental changes, our ongoing stewardship of resources both north and south will continue to be important.

We must do all that we can to help build and support strong economies in our regions. A part of this role is taking action now so that we have the people with the right skills in place in the long-term. We already know that the nature of employment within the utility sector will undergo substantial change and that the

skills and capabilities of our future employees will be different from those of today (with a greater focus on data and analytics, for example).

OUR LONG-TERM APPROACH

Investing in our regions

Our ambition is to support as much income generation in our regions as we can from the investment and expenditure we make as a business. We recognise the importance of the local supply chain and currently spend around two-thirds of our investment and expenditure with these companies. We will continue to work with our suppliers, including in particular small and medium-sized enterprises, to ensure maximum value for our customers.

We will continue to report to customers on the impact our investment is having on the economies in our regions. Last year we published a report, 'Our contribution', which built on our annual financial reporting to look at our influence and impact in the wider economy, the environment and society. The report identified the positive and negative flows of our business and set out our contribution to the five areas that we rely on for our goods and services (financial, manufacturing, human, natural and social).

Supporting growth

We already work in partnership across our water and wastewater activities to provide sustainable services that support the needs and aspirations of the region in a timely manner.

In addition to our ongoing investment in asset capacity we are developing a strategy that will ensure that we continue to deliver this commitment. This includes plans to expand our existing relationships with our developer customers and to incentivise sustainable water management. We will also identify growth-ready development sites that we will promote in terms of wastewater capacity. And we are exploring how we can best support housing developers by providing clarity, certainty and consistency as they plan and deliver housing schemes in our regions.

Leaving a lasting legacy

We devote substantial energy and resources to making sure that we leave a lasting legacy in our regions. We are already investing through our joint initiatives with universities, academics, and businesses.

As part of this long-term strategy we are taking steps now to make sure we have the right workforce in future. We work with partners from across the utility sector to tackle the problem of future skills shortages by engaging with schools, investing in apprentices and sponsoring research, particularly in the science, technology and engineering disciplines.

BUILDING SUCCESSFUL ECONOMIES IN OUR REGIONS

CASE STUDIES

For example, there are currently more than 60 young people completing an apprenticeship in the business, earning as they learn; more than 100 of our existing employees are increasing their competence, knowledge and confidence, studying for apprenticeships, diplomas or degrees; and we sponsor around 30 students through their postgraduate research. We are also investing in an enterprise Academy as part of our wider strategy to attract talented, enthusiastic young people with the right attitudes and behaviours to help meet our future needs.

We are members of the Energy and Utility Skills Partnership, which aims to tackle future skills shortages and to help find 221,000 new recruits to the industry by 2027. We contributed to the first ever Workforce Renewal and Skills Strategy for the sector, launched in February 2017.

Finally, we are committed members of organisations that care about the local economic and social infrastructure, such as the North East Local Enterprise Partnership and Business in the Community.

The Asset Investment Hub

We have recently set up a co-located office in Seaham where we work alongside the supply partners that are involved in upgrading our network and treatment assets. The hub houses around 250 skilled employees including Northumbrian Water employees and those from our framework partners Interserve, Stantec/Esh Construction and Mott MacDonald Bentley (MMB).

Co-location brings many benefits including being more efficient, allowing for smarter working practices and enabling us to take the collaborative approach that is such a fundamental part of our overall business strategy. This is just one example of the very close relationships we have with our suppliers and our strategy of working jointly in order to deliver our long-term vision.

North Morpeth Strategic Sewer

By supporting growth we can contribute to the economic prosperity of the regions we serve. In an industry-leading approach to the delivery of infrastructure to support development, we worked closely with Northumberland County Council to develop a sustainable, future-proof approach for serving a development of 2,000 new homes in north Morpeth. Together we devised a drainage master plan that used the route of the Morpeth Northern Bypass and planned trunk road to construct a new strategic sewer. The sewer serves all of the sites identified for development and allows for further development as it is needed. Local stakeholders supported the approach, not least because of the significant cost savings it brought. It also means that there was no increase in the risk of flooding for the town centre.

The project won the Royal Town Planning Institute North East Award for Planning Excellence, where it was noted that the project highlighted what can be achieved through real collaborative planning and was a model of best practice for infrastructure delivery nationwide.



TRANSPARENCY AND ACCOUNTABILITY TO CUSTOMERS

Underpinning all of the priorities and expectations of our customers is a general expectation about how we should behave and how we should be accountable to customers. These are important aspects of customers' perception of trust in us, and their level of confidence in us as their supplier of water and sewerage services. It is something we care very much about.



Trust and confidence is informed by elements such as the accuracy of the information we provide, and the open way in which we report performance (including how this compares with other companies). It is also informed by external assessments by others, including by our economic regulator Ofwat and by organisations such as CCWater that carry out surveys to assess levels of trust.

Trust and confidence is heavily influenced by how we behave and operate both as a business and as representatives of the business. We recognise this and this is reflected in our drive to make sure that all of our customer experiences are unrivalled.

We are strongly committed to reporting our operating performance in a very open way and support the use of comparative information to drive improvements in performance. We have made significant efforts in this regard, for example by publishing comparative information on our own 'Discover Water' web pages.

In its most recent assessment of the quality of our information Ofwat stated that there was "no evidence of behaviour that would reduce trust and confidence" and that it considered that customers "can consistently place confidence in the information" we provide. We were awarded the highest category assessment ('self-assurance'), one of only three out of 17 companies to be placed in this category (the other categories being 'targeted' and 'prescribed').

OUR LONG-TERM APPROACH

Our ambition is to continue to be the most trusted water and wastewater company in the UK.

To achieve this ambition we will need to make a significant step change in our customers' understanding of their water and wastewater services, their perception of these services and their views about the value for money this represents.

We have co-created a range of ideas for doing this with our customers, including an initiative to implement our own Innovation Street, where we will work with innovative suppliers and manufacturers in a visible and interactive way for our customers. This will allow our customers to innovate with us while also increasing their understanding of the value of water and wastewater services.

One area of focus will be on extending the independence of our senior customers in their later years; we will also look at how we can help our customers reduce their household bills together with their impacts on the environment. We are developing the site with Newcastle University at Science Central, an exemplar of sustainable urban development in Newcastle city centre.

CASE STUDY

Our finances explained

It is our responsibility to operate, invest in and finance our business as efficiently as we can on behalf of our customers. We make sure the dividends that we pay to our shareholders are set at a level that is consistent with retaining a solid investment grade credit rating and delivering our required capital investment programmes.

At a recent workshop customers told us that they liked simple presentations of how much of their bill, in pounds and pence, goes towards different types of expenditure (such as staff, materials, interest, profit and energy) each day. They were much less interested in where the spending is directed, such as for sewage collection and water resources. We also learned that many customers did not understand why we need to borrow money (even though we are making a profit) or that we are required to pay tax.

The discussions helped us to improve the bill breakdown infographic that we provide with bills, to better explain where customers' money goes. We have also created a specific 'Our Finances Explained' section on our websites.

NEXT STEPS

This vision statement has set out how we plan to respond to our customers' priorities in the long term.

A cornerstone for the way we operate is that customers are at the heart of our business and that their views direct what we do. We will continue to engage with customers around the themes in this document over the coming months.

Their views will be taken into account in our 2020-25 business plan, which we will publish later this year.

We welcome any comments and feedback.

Please get in touch:

 [@NorthumbrianH2O](https://twitter.com/NorthumbrianH2O)

 [@ESWH20](https://twitter.com/ESWH20)

or email haveyoursay@nwl.co.uk.



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APPENDIX: OVERVIEW OF TRENDS AND DEVELOPMENTS


Through our foresight and horizon scanning activity we have identified significant trends and future developments. We have used the 'PESTEL' framework to categorise and analyse the macro-environmental factors that may have an impact as we shape our future.

This appendix summarises our developing thinking in identifying the political, economic, social, technological, environmental and legislative factors that are likely to be significant during 2020-25 and beyond.




POLITICAL

- Household retail
- Security and threats
- Legitimacy
- Brexit




TECHNOLOGICAL

- Digital
- Biotechnology
- Sensors
- Process intensification



ECONOMIC

- Affordability
- Natural capital
- Ageing infrastructure
- Population growth



ENVIRONMENTAL

- Sustainable drainage
- Circular economy
- Micropollutants
- Climate change



SOCIAL

- Customer expectations
- Debt
- Vulnerability
- Trust



LEGISLATIVE

- Environmental legislation
- Resilience

We have anticipated these trends and developments in our long-term strategy, setting out how, for example:

- We will combine insight gained through customer participation with effective adoption of emerging digital technology to ensure we understand and exceed our customers' future expectations for water and wastewater services.
- Our approach to equality, diversity and inclusion will address concerns around serving hard to reach and potentially vulnerable customers and ensuring services remain affordable.
- Our commitment to transparency and accountability will help strengthen public trust in utilities and civic services, and together with the ongoing provision of affordable and inclusive services will reaffirm the legitimacy of regulated private water companies and our position as the service provider of choice.
- Our plans to establish enduring partnerships to improve the environment will embrace the emergence of the circular economy and natural capital and will continue to deliver practical solutions for managing water in both urban and rural communities.
- Our vision of resilient and reliable services will not only address immediate challenges around security and serviceability of physical and digital infrastructure but will ensure we adapt to face future changes in climate and population.
- We are committed to supporting the economies of our regions, maintaining a physical presence in the communities we serve, supporting local businesses to innovate and grow, and continuing to support local suppliers and customers wherever possible as we move through the changes that Brexit may bring.
- Our leading approach to innovation will help resolve many of the inherent tensions present in delivering enhanced yet affordable and inclusive services in an uncertain future world: creating the right organisational culture, collaborating with world leading innovators, and responding effectively to the potential challenges and opportunities of emerging threats and technologies.

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