

Current water company activities

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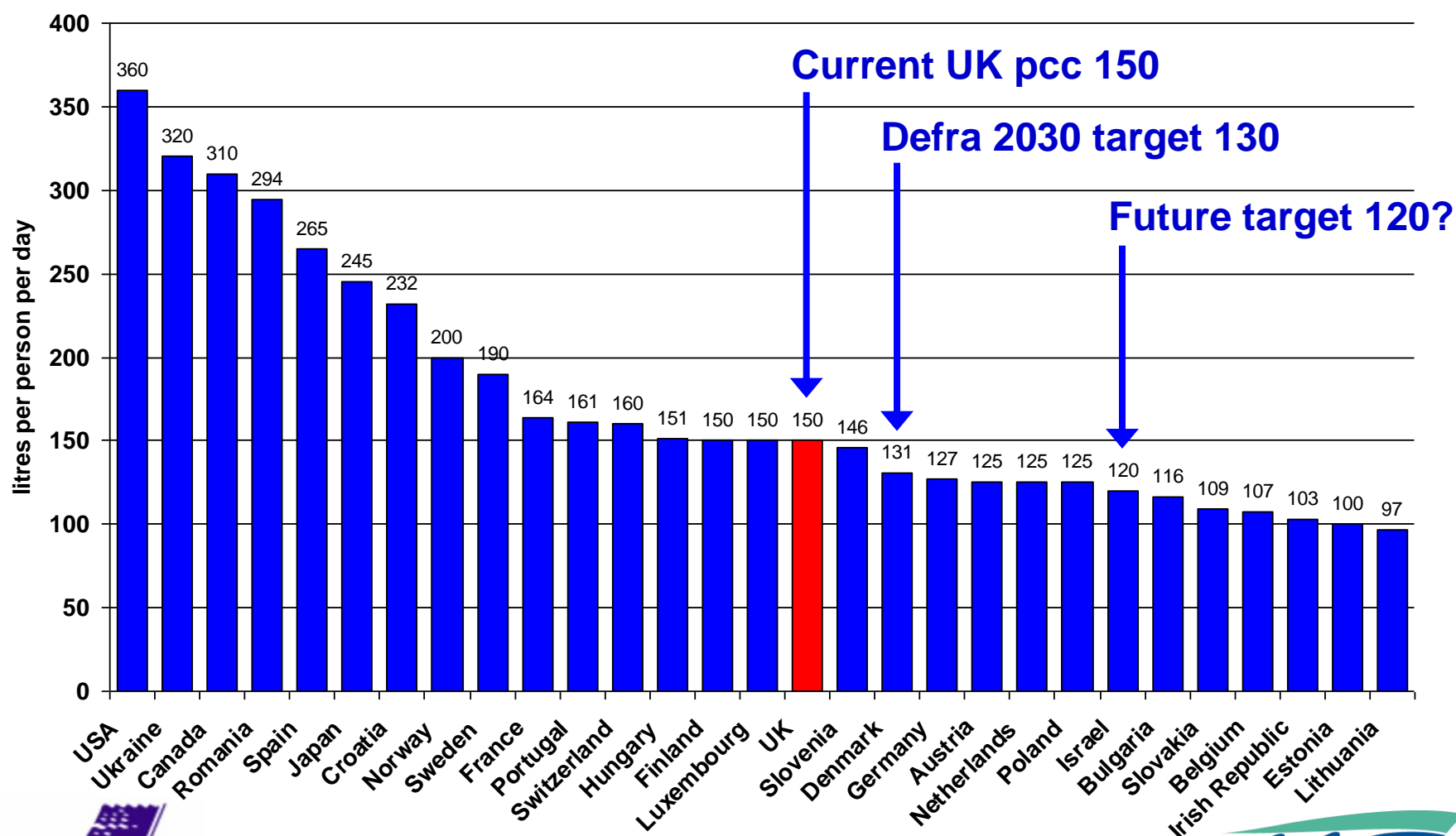
Current water company activities

- The challenge
- Past & present
- The future

The challenge we face

- UK has less water than most of Europe
- Spain / Italy / Greece have more than UK
- Predictions of increased water stress:
 - Population growth
 - Housing growth in dry areas
 - Smaller household size
 - Rising consumption
 - Climate change
 - Resource reductions (Habitats Directive etc)
- Must be factored into Water Resource Plans

International per capita consumption



The supply - demand gap

→ increase supply

- reservoirs & boreholes
- desalination
- Infrastructure enhancements

→ reduce demand

- leakage control
- metering
- tariffs
- water efficiency

So what has the industry done?

- Long established water efficiency network sharing best practice across the industry
- Lots of activity in the past two decades, but it has been wide rather than deep
- Last two years have seen a lot more activity both in scope and depth

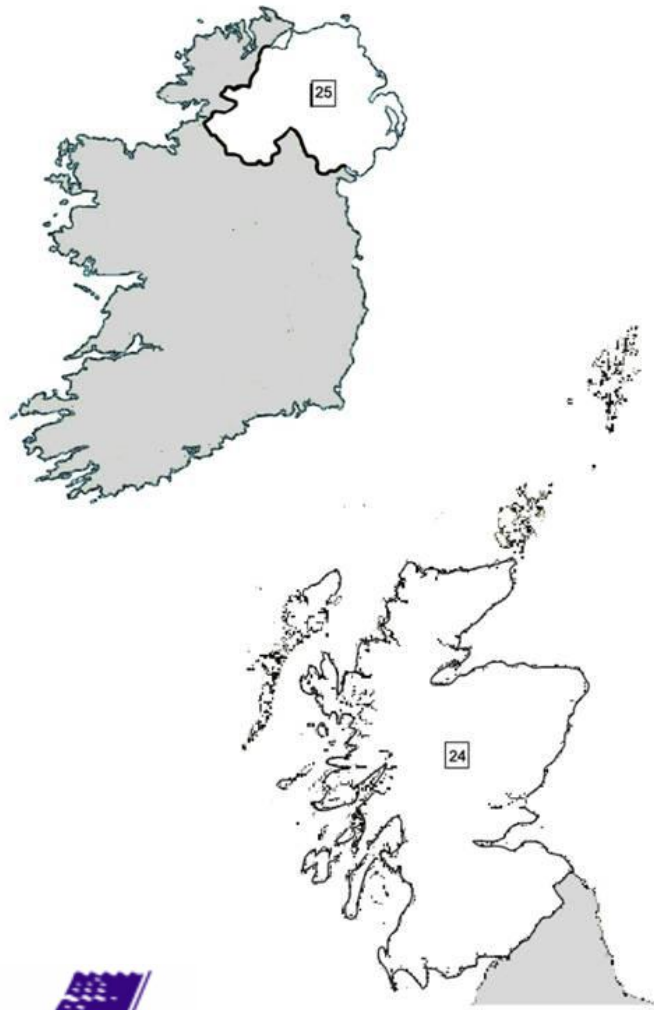
Recent water company activity

- Suite of UKWIR projects on water efficiency
- A lot of co-operation between water companies and a number of joint projects
- All companies have increased their baseline activity eg subsidised equipment & audits
- Water companies established Waterwise as an independent body in 2005

Current water industry projects

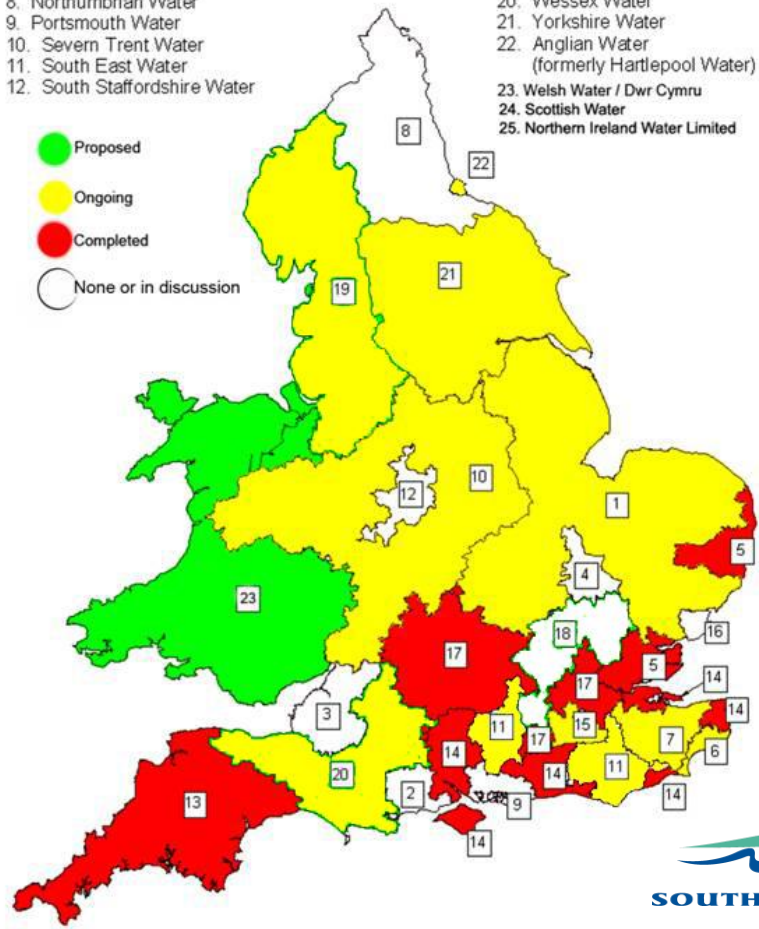
- More going on in the UK than any other country at present
- 20 major projects being carried out
- Evidence base for PR09
- Good spread throughout country

Research projects



- 1. Anglian Water
- 2. Bournemouth and West Hampshire Water
- 3. Bristol Water
- 4. Cambridge Water
- 5. Essex and Suffolk Water
- 6. Folkestone and Dover Water
- 7. Mid Kent Water
- 8. Northumbrian Water
- 9. Portsmouth Water
- 10. Severn Trent Water
- 11. South East Water
- 12. South Staffordshire Water
- 13. South West Water
- 14. Southern Water
- 15. Sutton and East Surrey Water
- 16. Tendring Hundred Water
- 17. Thames Water
- 18. Three Valleys Water
- 19. United Utilities
- 20. Wessex Water
- 21. Yorkshire Water
- 22. Anglian Water (formerly Hartlepool Water)
- 23. Welsh Water / Dwr Cymru
- 24. Scottish Water
- 25. Northern Ireland Water Limited

- Proposed
- Ongoing
- Completed
- None or in discussion



Water efficiency trials

→ Large variety of trials:

- Domestic customers
- Business customers
- Component studies
- Different devices eg shower heads, cistern devices

→ To be useful trials must:

- Measure the amount of water saved
- Measure the cost of the savings
- Be statistically valid
- Capable of extrapolation to larger group

→ Cost effectiveness is essential

Initial findings from company trials

- **South West – Water Efficiency Trial**
- **Essex & Suffolk – Toolkit**
- **Thames - Domestic liquid assets**

South West Water

- 6000 contacts; 22% response
- 430 homes, 2056 devices fitted
- Visit & fit: toilet retrofit, low use shower head, shower timer, leakage alarm etc
- Savings: 5% falling to 4% after 6 months
- Poor cost/benefit – mainly due to high cost of home visits

Essex & Suffolk Water

- Latest project – TOOLKIT
- 5,378 contacts; 20% uptake
- 19 products & services to choose from
- Plumbed and non-plumbed savings
- Plumbed - 15.1 litres per prop/day
- Non-plumbed - 8.1 litres per prop/day

Thames Water

- 10,454 contacts; 12.5% uptake
- 500 selected in Swindon, 500 in Bromley
- Visit and fit: toilet retrofit, low use shower head, shower timer, leakage alarm etc
- Initial indications are of 8% savings

The evidence so far

- Retrofitting water saving devices to existing homes saves water
- Savings vary between 4 and 15%
- The cost of devices is low
- Fitting devices is expensive
- Take up by customers varies 12 to 30%

What should companies do now?

- UKWIR database & Waterwise economic analysis provide the best available knowledge
- Now is the time to move beyond trials and data analysis to full scale initiatives
- Understanding, support and flexibility from Government and regulators is essential
- Risks must be shared
- A number of full scale initiatives are proposed

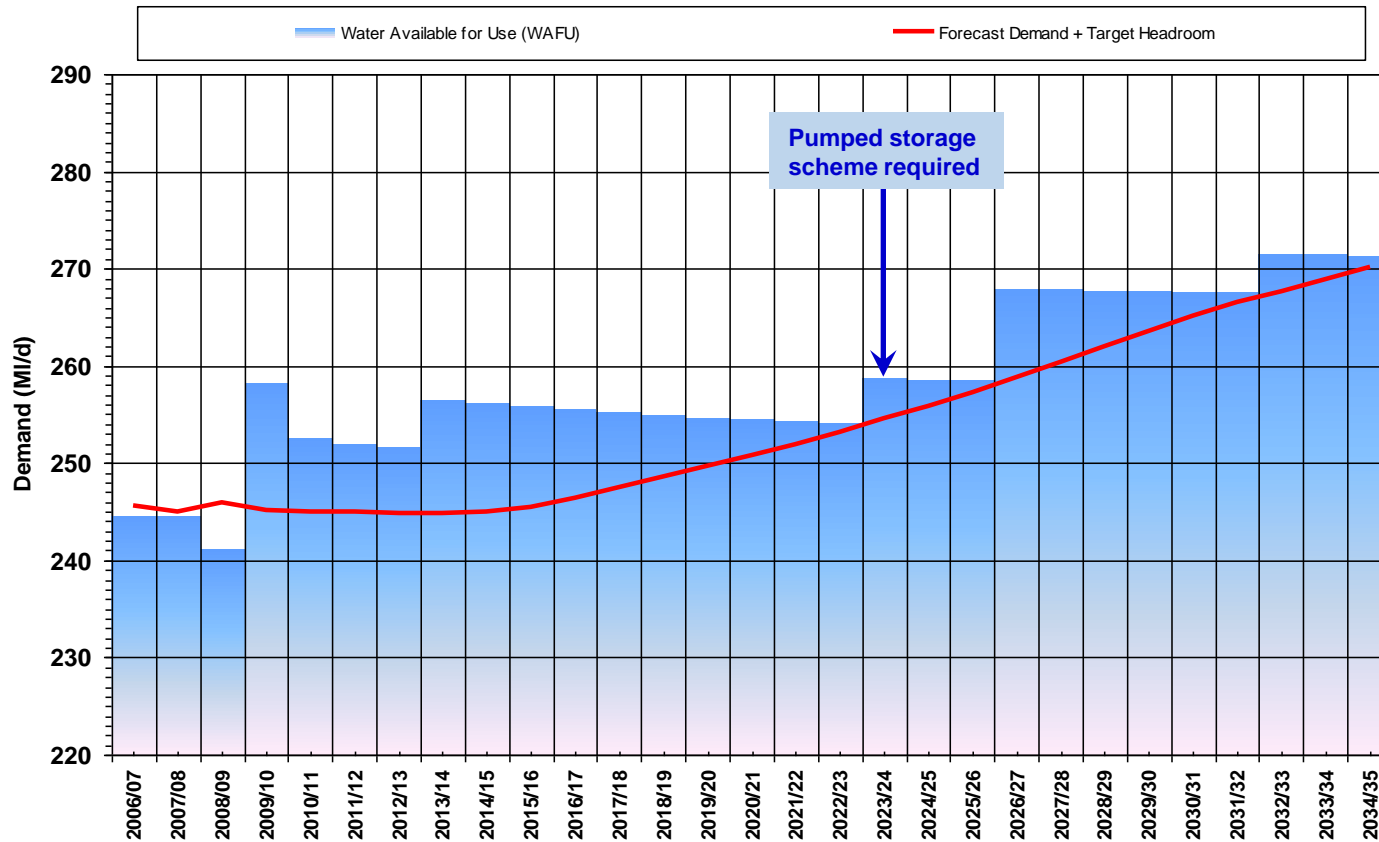
SWW PR09 water efficiency projects

- **Project 1 - Domestic water efficiency**
 - Eaga, universities, SWW & regional landlords
 - 54,000+ visits per year fitting EcoBeta cistern devices
- **Project 2 - Small & medium enterprises**
 - 140 commercial water audits per year
 - SWW carries out work, customer pays cost back
- **Project 3 - Waste Water Treatment Works**
 - 2300 MI per year potable water use at WWTW

**Total cost approx £4.2m;
total savings approx 8 MI/d**

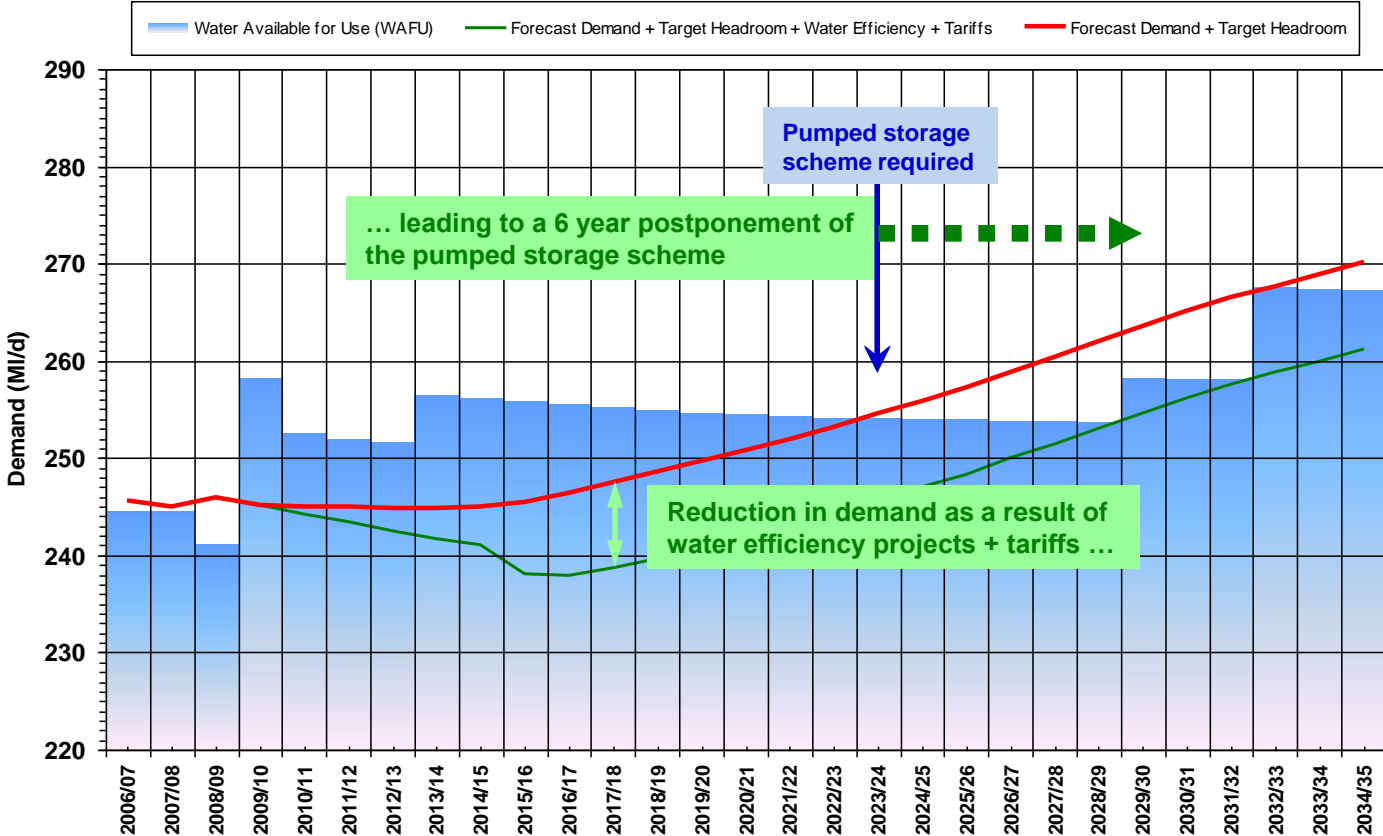
SD balance

Roadford Resource Zone Supply - Demand Balance



SD balance + efficiency + tariffs

Roadford Resource Zone Supply - Demand Balance



The way forward

- Industry is committed to making water efficiency work, practically and economically
- Companies have submitted proposals in their draft Water Resources Plans
- The main players in the PR09 process must work together to promote water efficiency
- There needs to be a commitment from all parties to ensure that it happens