

شركة المياه الوطنية  
National Water Company



# NWC Overview

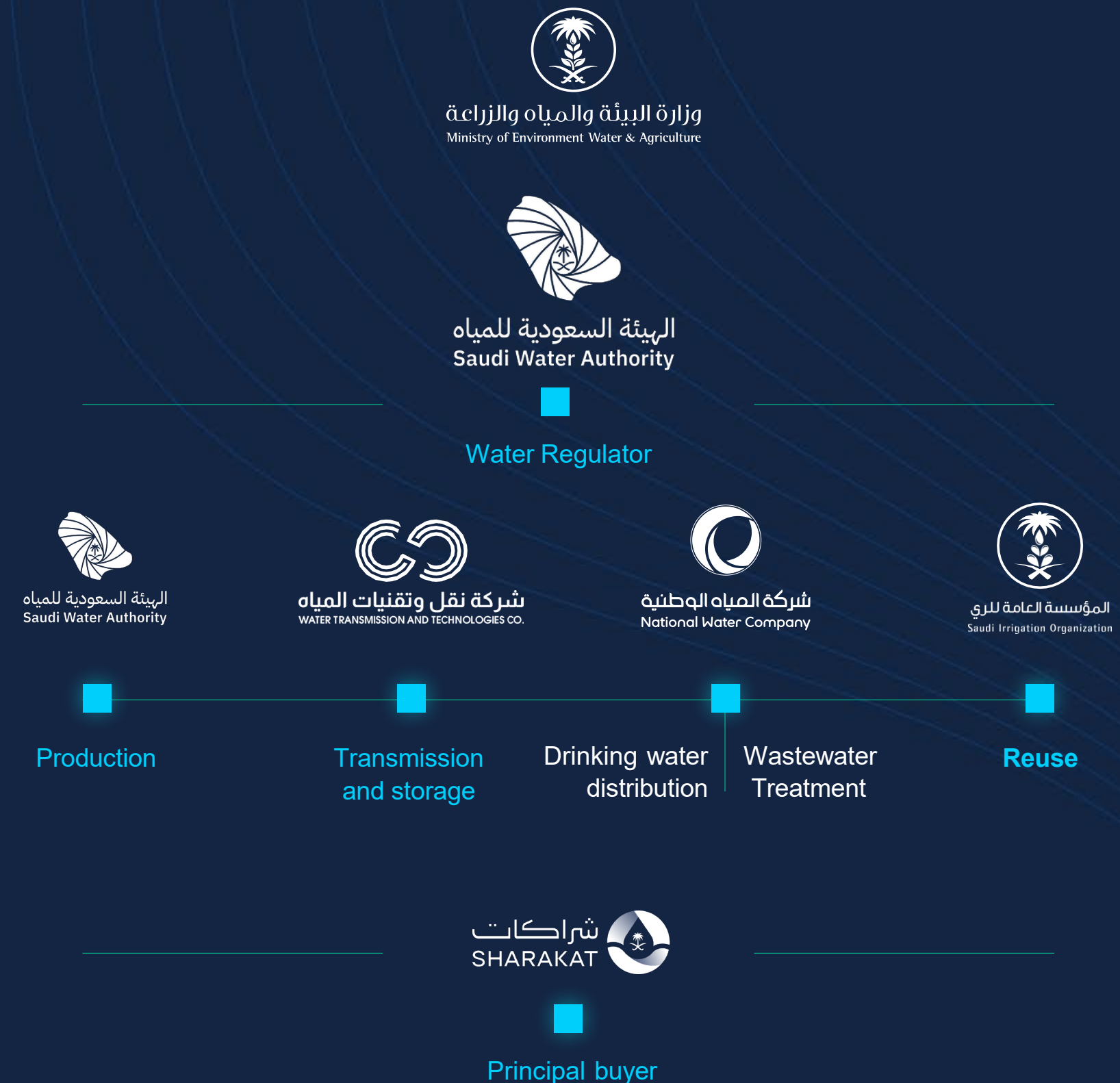
## Kingdom of Saudi Arabia

# About National Water Company

## National Water Company

### Water distribution sector

- A Saudi company fully owned by the Public Investment Fund (PIF) Established in 2008.
- Distributing potable water that is complying with the local and international standards.
- Collecting and treating wastewater and producing high quality treated effluent that is suitable for reuse across the Kingdom of Saudi Arabia.



# NWC Strategy



## Purpose

Safeguarding water for people, environment, and the future of Saudi Arabia

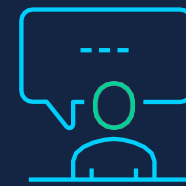
## Vision

To be a world leading provider of reliable, efficient, sustainable and equitable water services

## Mission

To deliver water and wastewater services by leveraging digital innovation, strategic partnerships and organizational excellence, to expand access and elevate customer experience

## VALUES



Customer Centric



Ownership



Agility



Collaboration

# NWC in numbers 1/2

Number of Customers

**2.54**

Million

Avg. Water Supply

**20.45**

Hour /day

Tertiary treated Water

**93.24%**

Avg. Daily water supply

**10.26**

Million m<sup>3</sup>/day

Avg. Volume of WW Treated

**6.4**

Million m<sup>3</sup>/day

Water Quality

**98.48%**

Water Network Length

**134.7**

Thousand KM

WW Network Length

**52.55**

Thousand KM

Number of Employees

**10+**

Thousand



■ Numbers until March 2026

# NWC in numbers 2/2

Customer Satisfaction

73%

In House

Water Coverage

85.9%

Hour /day

Non-Revenue Water

35%

Feb 2026

Avg. Water Connection Time

10.7

Working Day

Waste Water Coverage

68.1%

Hour /day

# Wastewater Treatment Plants

180

Avg. W. Water Connection Time

11.8

Working Day

Treated Water Quality

97.4%

Local Content

71.4%



■ Numbers until March 2026

# National Water Strategy and Vision 2030

NWCs Privatization Program is aligned with the strategic objectives of the National water strategy, published by MEWA in 2017 for its contribution to Vision 2030.

The key components defining the NWC programs were:

Distribution Sector Restructuring & Privatization

Improvements in Service Quality and Financial Efficiency

# NWC Journey

## 2008

Managing 4 major cities



Different administrations: four cities managed by the company and the rest of the regions managed by the ministry leading to where multiple policies, procedures and administrative systems within the distribution sector.



- National Water Company Water
- Services Directorates

## 2017

Management and supervising distribution sector



The approval of the Supreme Order for the National Water Company to supervise and manage the water distribution sector in the Kingdom of Saudi Arabia.



- National Water Company
- NWC Supervision scope

## 2021

Directorates integration (1 NWC)



Completion of the merger of all areas of the distribution sector under six sectors leading water distribution sector across the kingdom of Saudi Arabia



- National Water Company

# NWC Journey

## 2022

MoMC & LTOM partnerships

Completing the signature of MoMC across all the clusters, While overall capacity of LTOM is placed to be (6.6 m<sup>3</sup>/day)

## 2026+

Preparation & Concession contracts

Concession contracts will maximize the value the Kingdom could gain from involving private investors, by transferring as much operation and capital expenditure responsibility as possible



# Strategic Targets



**85%**

Water coverage %

**70%**

Wastewater coverage %

**21.9**

Hours of Supply

**27%**

Non Revenue Water

**98%**

Water Quality %

**100%**

Wastewater Collection %

**100%**

Wastewater Tertiary Treatment (%)

# Prominent Initiatives and Strategic Projects

## 2018

## 2030



Improving customer experience and services



Implementing 5-year CAPEX projects Portfolio



Implementing MOMC contracts and maximizing their benefits



LTOM contracts for STPs



Private Sector Participation in ISTPs (BOOT)



Assets valuation and efficiency improvements




Improving environmental compliance



Promoting the business to be more financially sustainable



Reviewing and updating the operational model



Digital transformation and data analytics



Employee development and promoting performance culture



Readiness for concession contracts

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# MoMC, LTOM and Concessions

# MoMCs and LTOMs



**MoMC**  
**In Operation**  
 MANILA WATER, saur, Maifona

**MoMC**  
**In Operation**  
 aqualia, HAAISCO, توزيع TAWZEA

**LTOM**  
**Awarded**  
 North Cluster group (338 k m3/d) 联合水务 UNITED WATER, ARMADA HOLDING

**LTOM**  
**Evaluation**  
 Northwest Cluster – Madinah group (514 k m3/d)  
 Northwest Cluster – Tabuk group (146 k m3/d)

**MoMC**  
**In Operation**  
 VEOLIA, الشركة الوطنية للمياه والطاقة Akhonor Water & Power Technologies

**MoMC**  
**In Operation**  
 suez, Awael أوائل

**LTOM**  
**In Operation**  
 VEOLIA, Awael أوائل, Jeddah (790 k m3/d)  
**In Operation**  
 Maifona, THABAT, Makkah (500 k m3/d)  
**In Operation**  
 global omnium, Taif (147 k m3/d)

**LTOM**  
**In Operation**  
 Riyadh Manfouha (700 k m3/d)  
**In Operation**  
 Riyadh Heet & Alhaer (870 k m3/d)  
**Preparation**  
 Central Cluster group (123 k m3/d)

**MoMC**  
**In Operation**  
 MANILA WATER, saur, Maifona

**LTOM**  
**In Operation**  
 Al Ahsa (472 k m3/d)  
**In Operation**  
 Dammam (331 k m3/d)  
**In Operation**  
 Al Khobar (323 k m3/d)  
**Tendering**  
 Eastern Cluster group (263 k m3/d)

**MoMC**  
**In Operation**  
 Acciona, aqualia, HAAISCO, توزيع TAWZEA

**LTOM**  
**Preparation**  
 South Cluster – Jazan / Najran group (325 k m3/d)  
**Preparation**  
 South Cluster – Aseer / Al Baha group (384 k m3/d)

# Preparation & Tendering for Concessions

Design of the Conceptual Framework & Assessment of Cluster Readiness.

Preparation of Pre-tender Documentation

Tendering of each concession and preparation for startup



It is planned that the selected advisor consortium will start work in Q3 2026

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# Business Development

# Business Development Objectives



Additional Revenue streams



Diversification



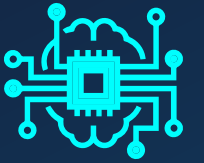
Business Integration



Brand & Market Positioning



Innovation & New Technologies



Knowledge Transfer



Sustainable Business Growth

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THANK  
YOU