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STRICKTLY CONFIDENTIAL

Thursday, 6th February 2025

[redacted] - BP Business Development, Hydrogen
Chertsey Road
Sunbury On Thames
Middlesex
England, TW16 7BP
By Email

Dear [redacted]

Further to the commercial discussions held at the end of November 2024 with you and your team and my letter dated the 2nd December 2024. As requested, I write to update you on the demand forecasts and our ability to supply Industrial / Raw / Potable water. As I am sure you will appreciate this is a dynamic and moving picture and this letter necessarily represents a moment in time, I will of course let you know if things change dramatically.

I note you require 0.3 Ml/d Raw/Industrial water in the construction phase in early 2026, you increase flows up to 8.4Ml/d in late 2028. With regards to potable water, you require 0.6 Ml/d in early 2026 and by mid 2028 it reduces to 0.018Ml/d. This is replicated in the operational phase. As H2T transitions from commissioning activities to start-up. We can confirm we have sufficient capacity to supply with the April 2025 investment program, changes to regulatory approvals and an abstraction license change.

It is important to note that we have factored your requirements into the total demand for all customers. As such commitments made here are subject to no further increase in demand levels and timeline shifts.

Discussions and implementation of the `take or pay ` arrangements have started and I will make arrangements to commence these with you in relation to H2T.

Yours sincerely

[redacted]

[redacted]
Head of Commercial Strategy &Transformation
Business Continuity & Emergency Planning E: [redacted]@nwl.co.uk
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