Utility Regulator
ELECTRICITY GAS WATER

RETAIL MARKET MONITORING

Quarterly Transparency Report

Quarter 3: July to September 2020

Published: 30 November 2020



Abstract

This paper is the latest of a series of Utility Regulator (UR) reports – the Quarterly Transparency Reports (QTRs) – that provide a range of information about the retail energy market in Northern Ireland (NI).

The data relates mainly to market shares, market activity and domestic prices in the electricity and gas retail markets. The data also includes information on non-domestic, or industrial and commercial (I&C), electricity prices.

We collect and monitor market information through the Retail Energy Market Monitoring (REMM) framework.

The information shown in this report comes from network companies, suppliers and Eurostat. Some figures have been calculated internally.

These reports are released at the end of the second month after each calendar quarter (in Feb, May, Aug and Nov).

Audience

Electricity and gas industry, associations of consumers, regulators, statistical bodies, suppliers, potential new market entrants, consultants, researchers and journalists.

Consumer impact

The information used to produce these reports allows us to monitor the retail market, flag potential concerns and to inform regulatory decisions. All of this directly impacts on consumers. This set of reports increases transparency for consumers on matters of their direct interest, such as the active suppliers in each energy market sector, and NI prices compared against other jurisdictions.

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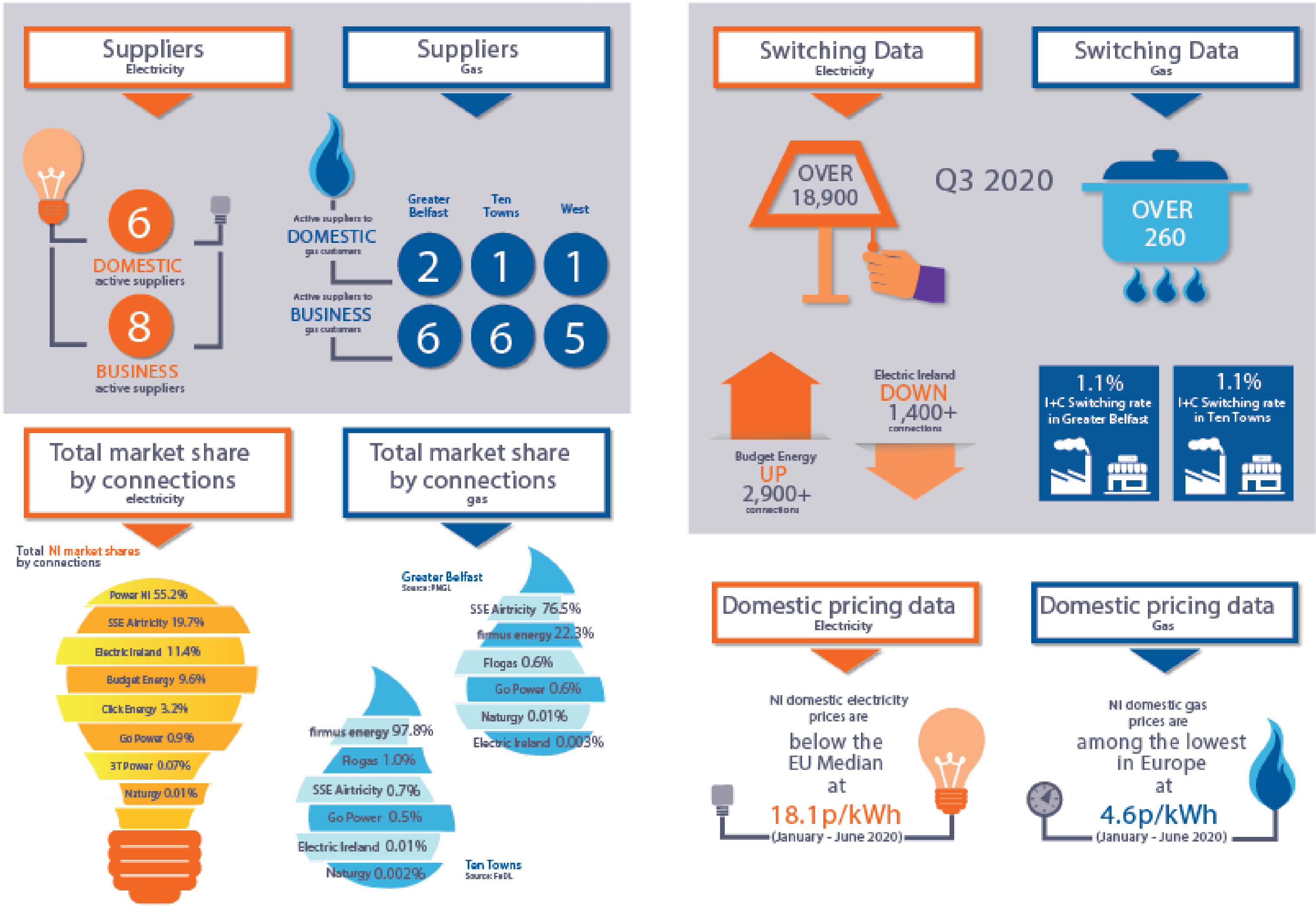
Northern Ireland Retail Market Monitoring Quarter 3 2020



1.1 Key developments during Quarter 3 2020

1.	The semester 1 (January to June) 2020 electricity pricing data is sourced from Eurostat and individual supplier's submissions under the REMM framework. The current pricing data illustrates the following: • NI domestic electricity prices continue to rank below the EU median (18.5 p/kWh), are lower than the Republic of Ireland (21.1 p/kWh), and the UK (19.3 p/kWh). • The NI I&C electricity price for the Very Small connections (which represent c69% of I&C connections) is 15.9 p/kWh, which is lower than the Republic of Ireland (19.2 p/kWh), the UK (17.4 p/kWh) and the EU median (16.2 p/kWh). • For large I&C customers (c0.02% of connections) NI prices (8.7p/kWh) are just above RoI (7.8p/kWh) but lower than the UK (12.2 p/kWh).
2.	The domestic gas prices in NI are amongst the lowest in Europe at 4.6 p/kWh. This is less than RoI and EU median both of which are 5.8 p/kWh. NI prices are marginally higher than the rest of the UK at 4.2 p/kWh.
3.	Market activity in the electricity domestic and I&C sectors continues to illustrate a gradual change in the market dynamics. Power NI (the incumbent price controlled electricity supplier) retain their dominant position with 55.2% of connections in the domestic market with continued growth of the competing suppliers.
4.	Overall electricity switching activity in Q3 2020 has increased from the previous quarter. The domestic switching rate has increased from 1.3% to 2.2% in the current quarter. There were over 18,200 domestic switches completed during Q3 2020, with a notable increase in Budget Energy's connections for this quarter (>2,900). I&C electricity switching decreased in the period to a switching rate of 0.9% (from 7.2% in the previous quarter), with over c680 switches completed.
5.	In the gas sector, I&C switching activity increased in Greater Belfast with an increase in the I&C switching rate from 0.5% in Q2 2020 to 1.1% in Q3 2020. However, the I&C switching rate for Ten Towns decreased from a switching rate of 4.2% in Q2 2020 to 1.1% in Q3 2020.

2 Introduction

2.1 Purpose, methodology and data sources

The purpose of this report is to deliver transparency for stakeholders and consumers, providing readers with readily accessible information on the evolution and performance of Northern Ireland (NI) electricity and natural gas retail sectors.

The Quarterly Transparency Reports (QTRs) are one of the tools we use to communicate some of the main indicators we monitor in the retail energy markets. We protect consumers by promoting effective competition wherever appropriate, and by monitoring the markets. Therefore, monitoring the retail markets is key when complying with our statutory duties.

The framework in which this set of quarterly reports lies is called Retail Energy Market Monitoring (REMM) which was introduced in July 2015. The ultimate objective of introducing this enhanced framework was to develop the current monitoring of retail indicators, and to provide increased transparency in the retail energy markets in NI. As a result of this framework, there have been a number of changes made to the format of this publication and how some of the indicators are presented. We will continue to make changes as appropriate to represent the new indicators that we are monitoring under REMM.

The main data sources for this QTR are as follows:

- Connections and consumption, market shares and market activity information is provided by the network companies:
    - Northern Ireland Electricity Networks (NIEN) for electricity data; and
    - Phoenix Natural Gas Limited (PNGL), firmus energy (Distribution) Limited (feDL) and Scotia Gas Networks Northern Ireland (SGN NG) for gas data.
- EU domestic and I&C electricity prices are from Eurostat. NI domestic and I&C electricity prices are derived directly from REMM data submitted by suppliers. NI domestic gas prices are also derived from REMM data submitted by suppliers.

2.2 Energy suppliers in NI energy market

The electricity and gas (in the Greater Belfast area) markets have been open to competition to domestic customers since 2007. However, there were no competing suppliers in the domestic market until 2010.

The Ten Towns area opened to gas competition for large I&C customers (those consuming over 732,000 kWh per annum) in October 2012, and to domestic and small I&C customers in April 2015. The first gas connection to the new West[1] gas distribution area was a large I&C user during Q1 2017.

[1] It is anticipated that gas in the West distribution area will be developed as per Annex 2, Part 3 of the Scotia Gas Networks Northern Ireland licence.

Table 2 Suppliers in the Retail Market

End of Q3 2020

	Network Operator							
	NIEN		PNGL		feDL		SGN NG	
	Electricity		Gas Greater Belfast		Gas Ten Towns		Gas West	
	Dom	I&C	Dom	I&C	Dom	I&C	Dom	I&C
Budget Energy								
Click Energy								
Electric Ireland								
firmus energy								
Flogas								
Go Power								
Power NI								
SSE Airtricity								
Naturgy								
3T Power								
Suppliers	**6**	**8**	**2**	**6**	**1**	**6**	**1**	**5**

Source: UR

During the third quarter of 2020 there were **eight** suppliers in the electricity market and **six** suppliers in the gas market although not all of these suppliers are certified to operate in all sectors (or in all gas distribution areas).

The detail of the dates of entry for the suppliers in each of the retail market segments is available in Annex A. For more information about the retail energy market in NI, please visit: https://www.uregni.gov.uk/supply.

2.3 Electricity wholesale market monitoring data

Readers should also be aware of the Quarterly Market Monitoring Report which provides an overview of the SEM and sets out recent trends in the market in relation to pricing, demand, scheduling and contract prices. It focuses in particular on the wholesale element of electricity prices, which makes up roughly 60% of customers' bills. These reports[2] are prepared by the Market Monitoring Unit (MMU) within the UR in joint collaboration with the Commission for Regulation of Utilities (CRU).

[2] SEM Monitoring Report covering the period 1 April 2020 – 30 June 2020

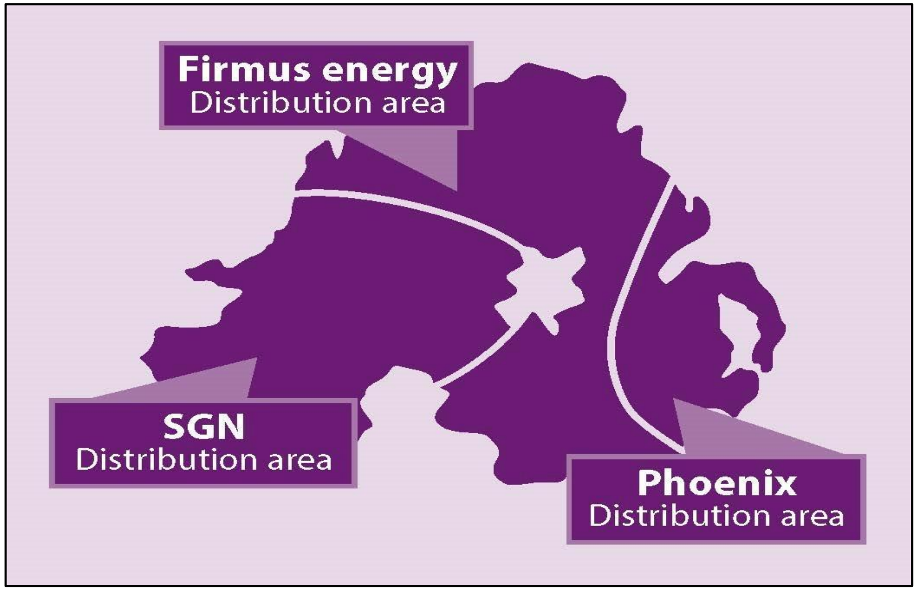
2.4 Northern Ireland gas market overview

The gas distribution network licensees are responsible for the medium and low pressure mains that convey to the licensed areas throughout Northern Ireland. There are three Distribution Network Operators (DNOs) who operate in separate distribution areas as illustrated on the map which follows:

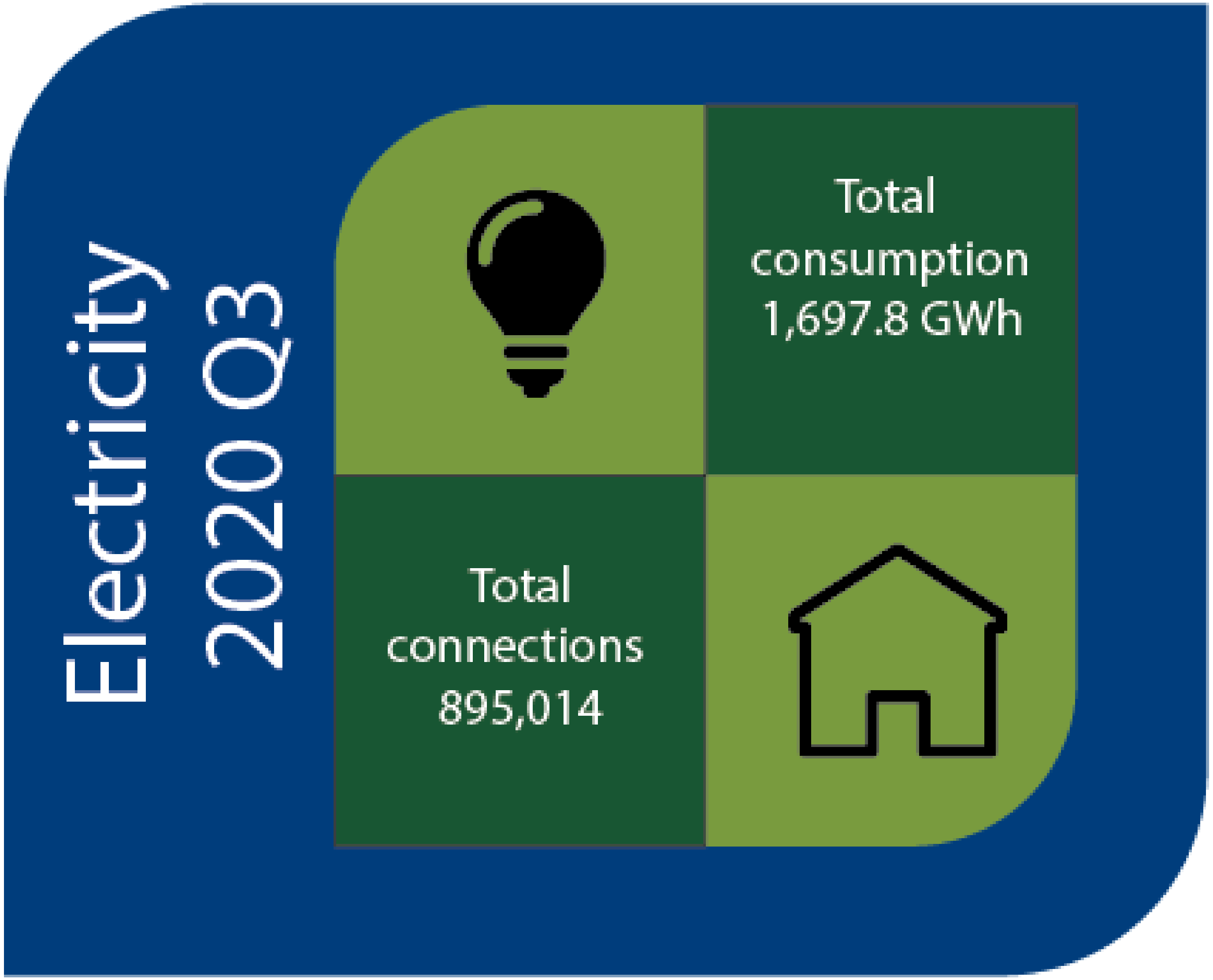
- firmus energy (Distribution) Ltd (feDL) from the North West through the Central region to the Southern areas of Northern Ireland;
- Phoenix Natural Gas Ltd (PNGL) mainly Greater Belfast, Larne and a recent extension into East Down; and
- SGN Natural Gas Ltd (SGN NG) in the West of Northern Ireland.

Each DNO owns and manages the natural gas distribution network in their distribution area. Those companies who supply gas (suppliers) pay the relevant DNO a fee to transport natural gas, and then sell it straight to the consumer. Although a DNO is responsible for making sure the natural gas reaches individual homes, it is the responsibility of the gas supplier to bill consumers for the gas they use.

Figure 1: Gas Distribution Licenced Areas



3 Electricity



3.1 NI connections and total consumption

The table below shows electricity customer numbers[3] at end September 2020 and consumption from July to September 2020.

Table 3 Electricity connections and consumption per market segment

Q3 2020

Customer groups	Number of connections	% share of connections in market sector	Consumption (GWh)	% share of consumption in market sector
Domestic prepayment	369,641	45.0%	262.5	43.0%
Domestic credit	451,483	55.0%	347.9	57.0%
Total Domestic	**821,124**	**100%**	**610.4**	**100%**
I&C < 20 MWh	51,537	69.7%	64.8	6.0%
I&C 20 – 49 MWh	12,432	16.8%	80.8	7.4%
I&C 50 – 499 MWh	8,925	12.1%	274.4	25.2%
I&C 500 – 1,999 MWh	738	1.0%	177.5	16.3%
I&C 2,000 – 19,999 MWh	240	0.3%	308.2	28.4%
I&C ≥ 20,000 MWh	18	0.02%	181.7	16.7%
Total I&C	**73,890**	**100%**	**1,087.4**	**100%**
Total	**895,014**		**1,697.8**	

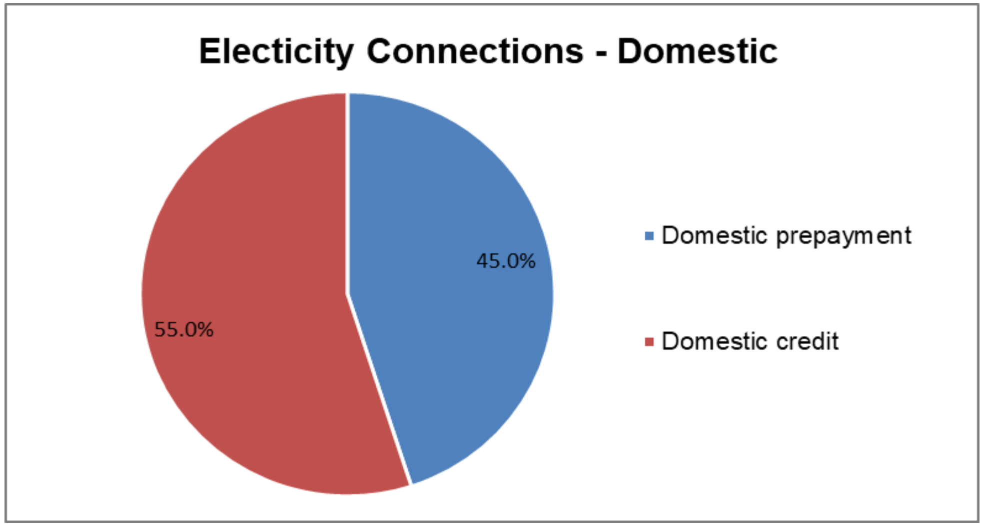
Source: NIEN

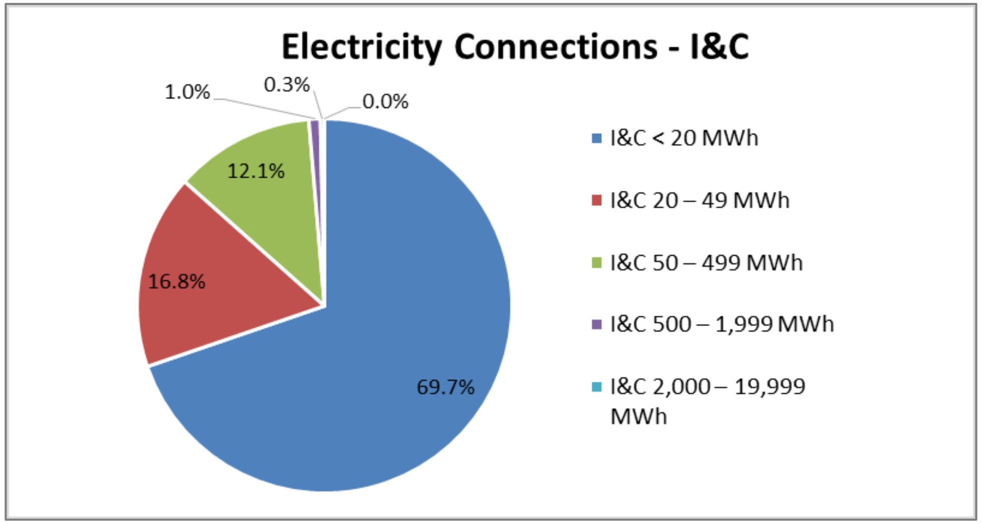
Of the total customers in Northern Ireland, 91.7% belong to the domestic sector, while the remaining 8.3% are I&C customers. In this quarter, this share translates into 36% and 64% in terms of consumption.

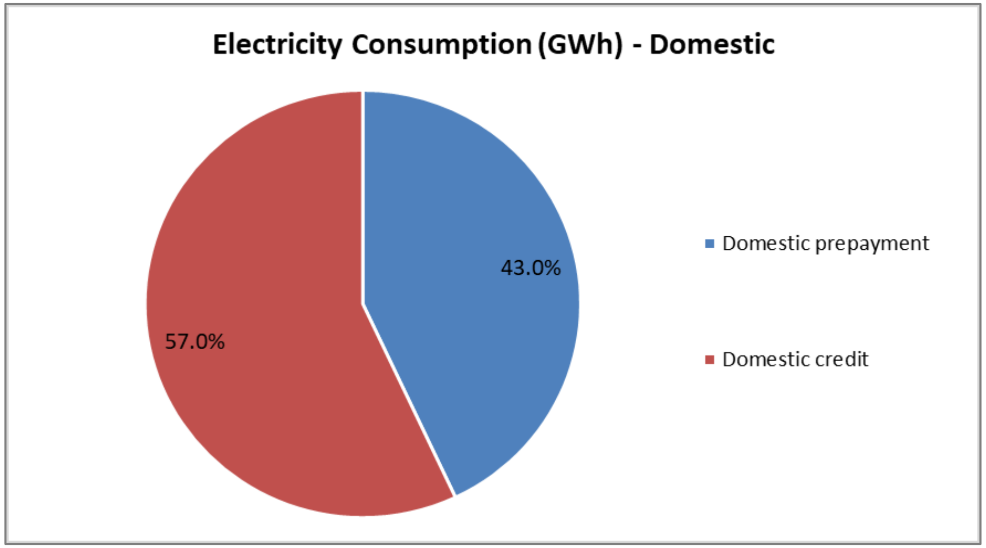
Within the domestic sector, 45.0% of the market use prepayment meters and 55.0% pay by credit (by connections).

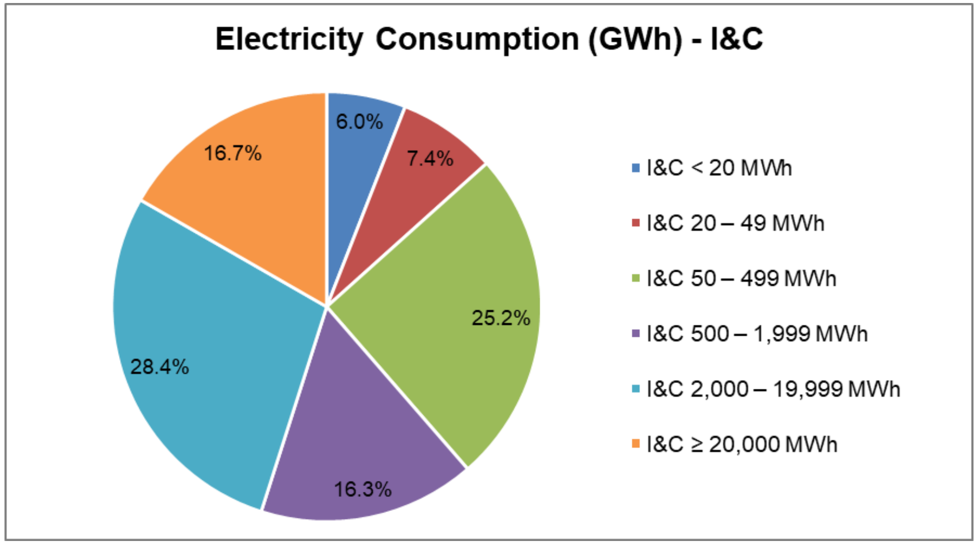
Within the I&C sector, more than 99.9% of the customers are small and medium enterprises (consuming less than 19,999 MWh), with 83.3% of the I&C consumption. The remaining are Large Energy Users (LEU) connections, that represent 10.7% of the total NI volume in this quarter, and 16.7% of the I&C consumption.

[3] Note that long term vacant sites are not included in connection numbers, and that combined premises are included in the <20MWh category


Electicity Connections - Domestic
45.0%
55.0%
Domestic prepayment
Domestic credit


Electricity Connections - I&C
1.0%
0.3%
0.0%
12.1%
16.8%
69.7%
I&C < 20 MWh
I&C 20 – 49 MWh
I&C 50 – 499 MWh
I&C 500 – 1,999 MWh
I&C 2,000 – 19,999 MWh


Electricity Consumption (GWh) - Domestic
43.0%
57.0%
Domestic prepayment
Domestic credit


Electricity Consumption (GWh) - I&C
6.0%
7.4%
16.7%
25.2%
28.4%
16.3%
I&C < 20 MWh
I&C 20 – 49 MWh
I&C 50 – 499 MWh
I&C 500 – 1,999 MWh
I&C 2,000 – 19,999 MWh
I&C ≥ 20,000 MWh

3.2 Electricity Market shares

Electricity shares by connections[4]

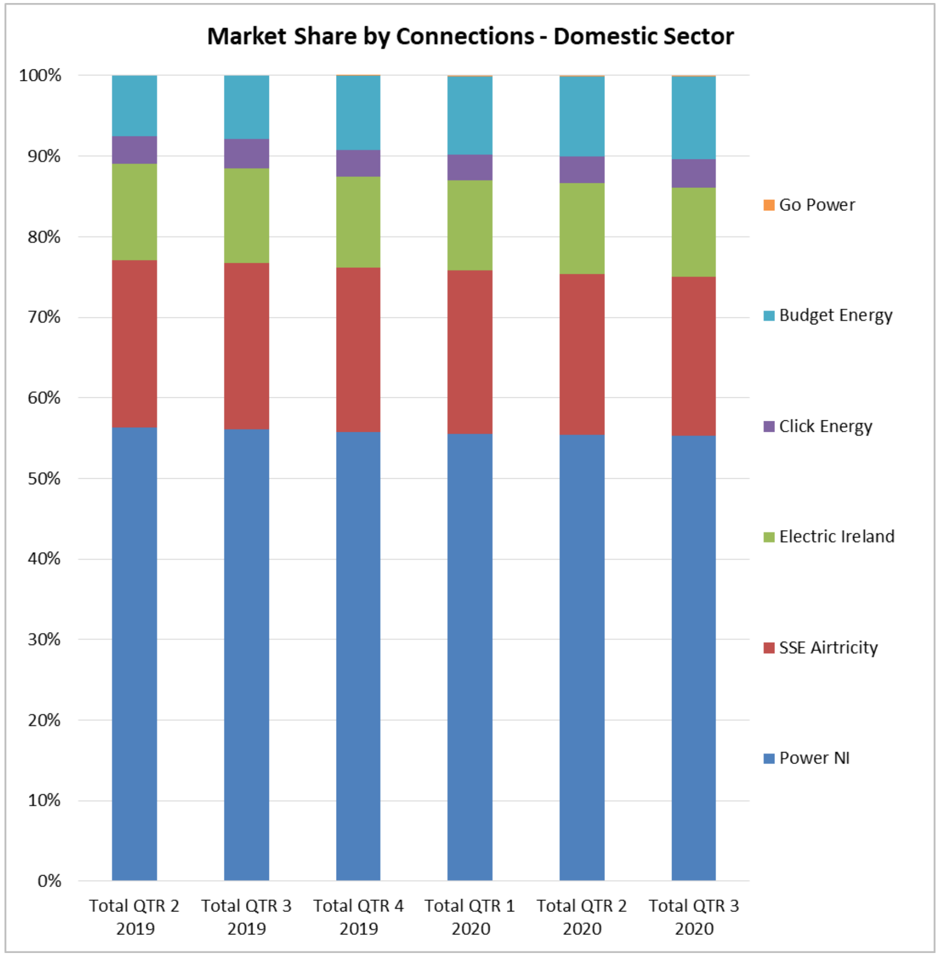
During the quarter there were six domestic electricity suppliers in NI, and eight active suppliers in the I&C electricity market. The total number of domestic customers at the end of Q3 2020 was 821,124. As is evident from the table below a significant number of domestic customers (55.2%) remain with the previously incumbent supplier Power NI. The introduction of a number of new suppliers and the associated increase in competition indicates that the dynamic of the domestic market is gradually changing.

Table 4 Domestic market shares by connections

End of Q3 2020

Domestic Suppliers	Domestic Prepayment		Domestic Credit		Domestic Total	
Power NI	160,419	43.4%	293,243	65.0%	**453,662**	**55.2%**
SSE Airtricity	65,536	17.7%	96,570	21.4%	**162,106**	**19.7%**
Go Power	-	0.0%	625	0.1%	**625**	**0.1%**
Electric Ireland	41,700	11.3%	49,604	10.9%	**91,304**	**11.1%**
Budget Energy	75,723	20.5%	9,324	2.1%	**85,047**	**10.4%**
Click Energy	26,263	7.1%	2,117	0.5%	**28,380**	**3.5%**
Dom Market	**369,641**	**100%**	**451,483**	**100%**	**821,124**	**100%**

Source: NIEN



The market shares in this quarter illustrate a similar position to the previous quarter for Power NI. For Q3 2020 Power NI supplied 43.4% of the domestic prepayment and 65.0% of the domestic credit market.

The continued slow growth of the new entrants in the domestic market is clear, given that the non-incumbents now represent over 44.8% of total domestic connections in NI (an increase from 43.9% in the same period last year).

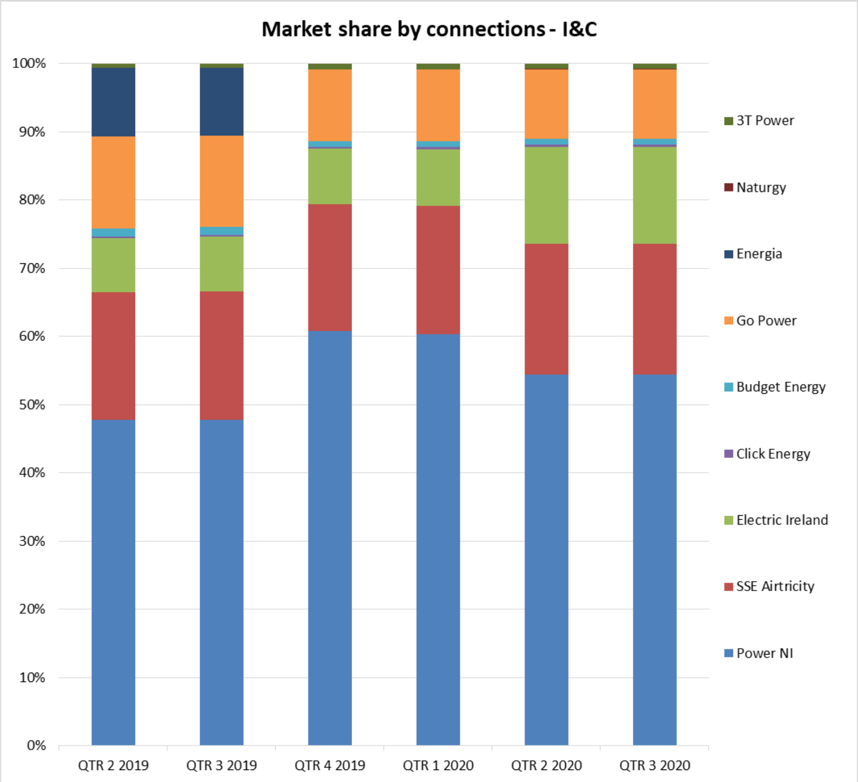
[4] Market shares figures do not include de-energised nor Long Term Vacant sites.

Table 5 I&C market shares by connections

End of Q3 2020

I&C Suppliers	I&C < 20 MWh		I&C 20 – 49 MWh		I&C 50 – 499 MWh		I&C 500 – 1,999 MWh		I&C 2,000 – 19,999 MWh		I&C ≥ 20,000 MWh		I&C Total	
Power NI	31,003	60.2%	5,377	43.3%	3,451	38.7%	246	33.3%	79	32.9%	3	16.7%	**40,159**	**54.3%**
SSE Airtricity	9,531	18.5%	3,046	24.5%	1,469	16.5%	94	12.7%	31	12.9%	5	27.8%	**14,176**	**19.2%**
Go Power	4,694	9.1%	1,531	12.3%	1,195	13.4%	77	10.4%	25	10.4%	3	16.7%	**7,525**	**10.2%**
Electric Ireland	5,389	10.5%	2,263	18.2%	2,504	28.0%	284	38.5%	97	40.4%	7	38.9%	**10,544**	**14.3%**
Budget Energy	390	0.8%	114	0.9%	58	0.6%	1	0.1%	0	0.0%	0	0.0%	**563**	**0.8%**
Naturgy	32	0.1%	5	0.04%	16	0.2%	16	2.2%	3	1.3%	0	0.0%	**72**	**0.1%**
Click Energy	204	0.4%	27	0.2%	14	0.2%	2	0.3%	2	0.8%	0	0.0%	**249**	**0.3%**
3T Power	294	0.6%	69	0.6%	218	2.4%	18	2.4%	3	1.3%	0	0.0%	**602**	**0.8%**
I&C Market	**51,537**	**100%**	**12,432**	**100%**	**8,925**	**100%**	**738**	**100%**	**240**	**100%**	**18**	**100%**	**73,890**	**100%**

Source: NIEN



The graph shows the trends in market shares (by customer numbers) for each active I&C supplier in NI by market segment, for the previous six quarters. Competition in the I&C market is more developed than the domestic sector, and consequently market shares are much more dispersed. Out of the eight active suppliers at the end of Q3 2020, based on customer numbers, four of these suppliers have shares in excess of 10% in the total I&C market.

Table 6 Total NI market shares by connections

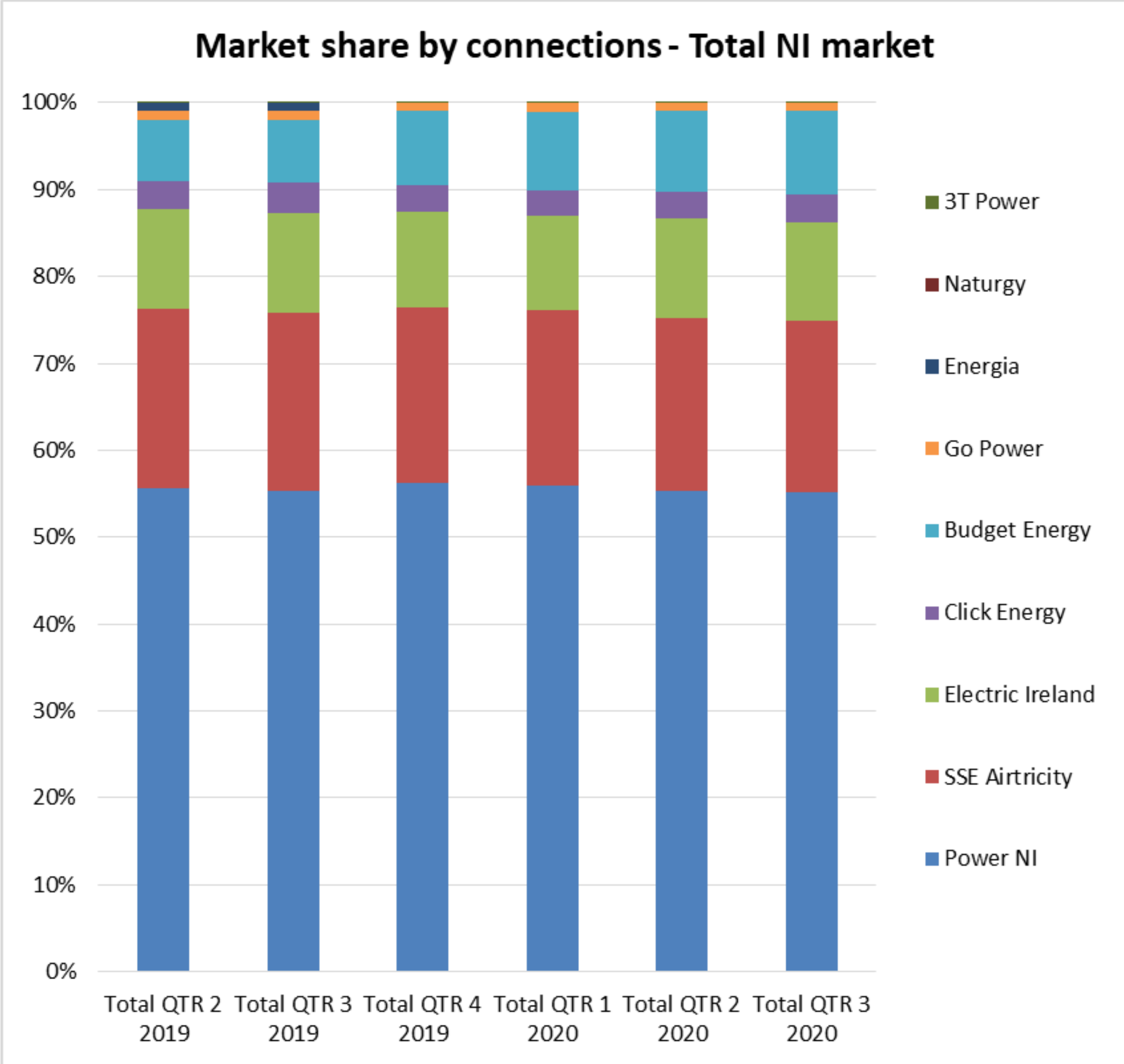
End of Q3 2020

Suppliers	Total	
Power NI	493,821	55.2%
SSE Airtricity	176,282	19.7%
Electric Ireland	101,848	11.4%
Click Energy	28,629	3.2%
Budget Energy	85,610	9.6%
Go Power	8,150	0.9%
Naturgy	72	0.01%
3T Power	602	0.07%
Total Market	**895,014**	**100%**

Source: NIEN

When looking at the electricity retail market as a whole by connections (domestic and I&C customers), Power NI's leading position as the incumbent supplier has remained static at 55.2% when compared to 55.3% in Q2 2020.

The graph to the right shows the trends in market shares (by customer numbers) for each active domestic and I&C supplier in NI for the previous six quarters.



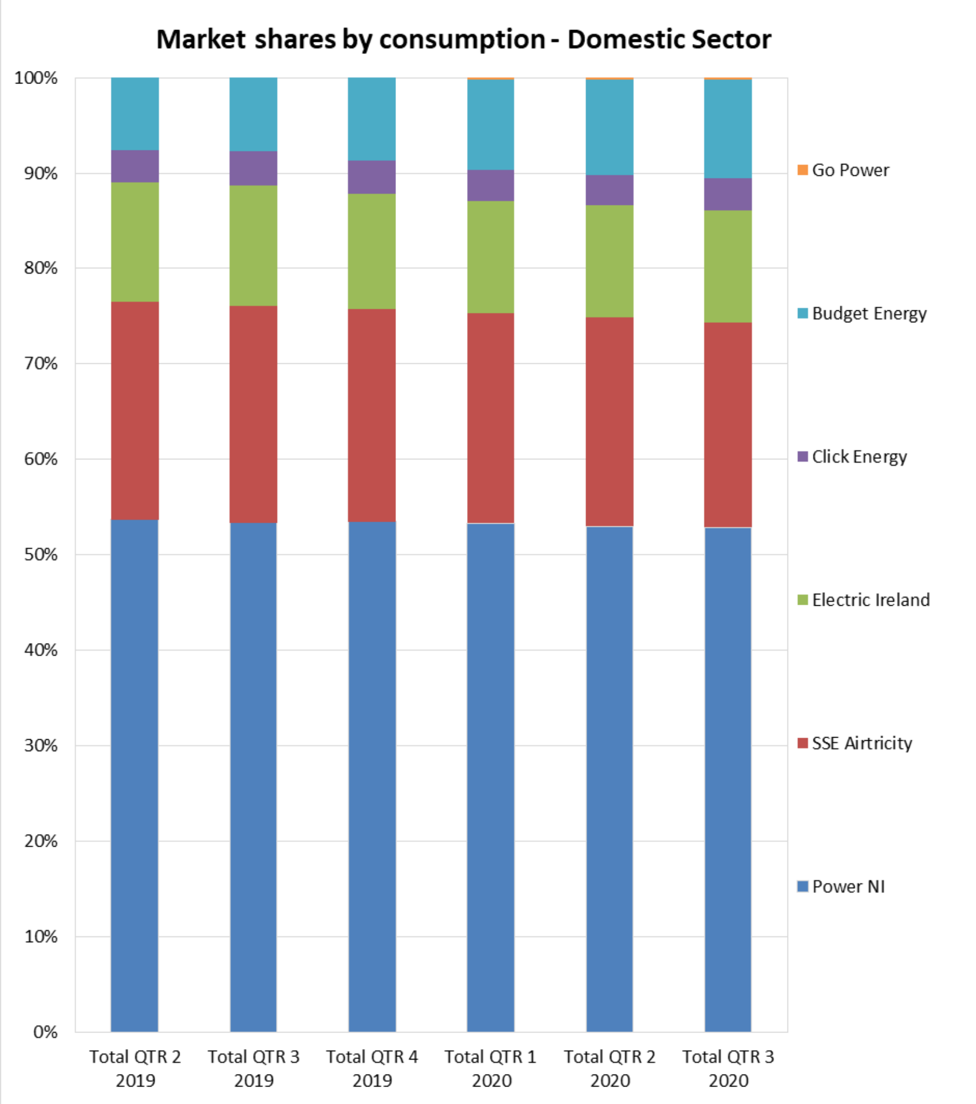
Electricity shares by consumption (GWh)

Table 7 Domestic market shares by consumption

Q3 2020

Domestic Suppliers	Domestic Prepayment		Domestic credit		Domestic Total	
	GWh	%	GWh	%	GWh	%
Power NI	110.5	42.1%	212.1	61.0%	**322.6**	**52.9%**
SSE Airtricity	46.7	17.8%	84.6	24.3%	**131.3**	**21.5%**
Electric Ireland	32.0	12.2%	39.5	11.4%	**71.5**	**11.7%**
Click Energy	18.7	7.1%	1.7	0.5%	**20.4**	**3.3%**
Budget Energy	54.6	20.8%	8.8	2.5%	**63.4**	**10.4%**
Go Power	0.0	0.0%	1.2	0.3%	**1.2**	**0.2%**
Dom Market	**262.5**	**100%**	**347.9**	**100%**	**610.4**	**100%**

Source NIEN



In Q3 2020, Power NI's share of the market by consumption was 42.1% for domestic prepayment and 61.0% for domestic credit, this is around the same level when compared to Q3 2019 when Power NI's domestic prepayment market share was 42.3% and their domestic credit market share was 61.7%.

The graph to the right shows the trends in market shares (by consumption) for each active domestic supplier in NI for the previous six quarters.

Table 8 I&C market shares by consumption

Q3 2020

I&C Suppliers	I&C < 20 MWh		I&C < 20 – 49 MWh		I&C 50 – 499 MWh		I&C 500 – 1,999 MWh		I&C 2,000 – 19,999 MWh		I&C ≥ 20,000 MWh		I&C Total	
	GWh	%	GWh	%	GWh	%	GWh	%	GWh	%	GWh	%	GWh	%
Power NI	35.9	55.4%	34.9	43.2%	100.4	36.6%	64.1	36.1%	94.3	30.6%	23.6	13.0%	**353.2**	**32.5%**
SSE Airtricity	12.9	19.9%	20.3	25.1%	43.7	15.9%	21.8	12.3%	41.9	13.6%	48.4	26.6%	**189.0**	**17.4%**
Go Power	5.7	8.8%	9.0	11.1%	34.4	12.5%	21.4	12.1%	24.9	8.1%	50.1	27.6%	**145.5**	**13.4%**
Electric Ireland	9.0	13.9%	15.1	18.7%	82.0	29.9%	60.8	34.3%	139.4	45.2%	59.6	32.8%	**365.9**	**33.6%**
Budget Energy	0.5	0.8%	0.8	1.0%	1.1	0.4%	0.2	0.1%	0.0	0.0%	0.0	0.0%	**2.6**	**0.2%**
Naturgy	0.0	0.0%	0.0	0.0%	0.8	0.3%	4.3	2.4%	3.9	1.3%	0.0	0.0%	**9.0**	**0.8%**
Click Energy	0.2	0.3%	0.2	0.2%	0.4	0.2%	0.4	0.2%	2.3	0.7%	0.0	0.0%	**3.5**	**0.3%**
3T Power	0.6	0.9%	0.5	0.6%	11.6	4.2%	4.5	2.5%	1.5	0.5%	0.0	0.0%	**18.7**	**1.7%**
Total Market	**64.8**	**100%**	**80.8**	**100%**	**274.4**	**100%**	**177.5**	**100%**	**308.2**	**100%**	**181.7**	**100%**	**1,087.4**	**100%**

Source: NIEN

The main suppliers by consumption in the I&C sector are Electric Ireland (33.6%), Power NI (32.5%), SSE Airtricity (17.4%) and Go Power (13.4%). Energia I&C customers transferred to Power NI in Q4 2019 and PowerNI have had an increased market share since.

The graph to the right shows the trends in market shares (by consumption) for each active I&C supplier in NI for the previous six quarters.

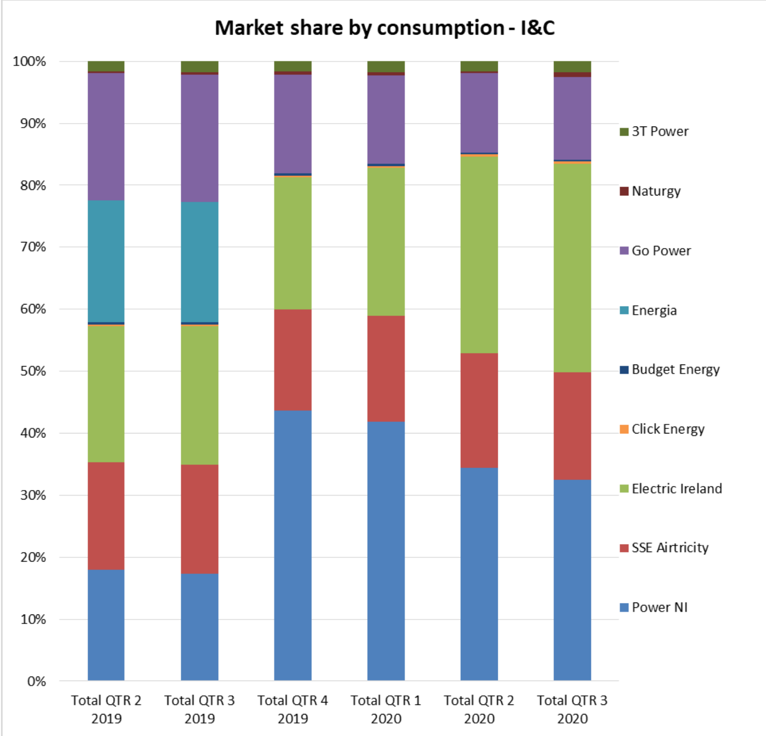


Table 9 Total NI market shares by consumption

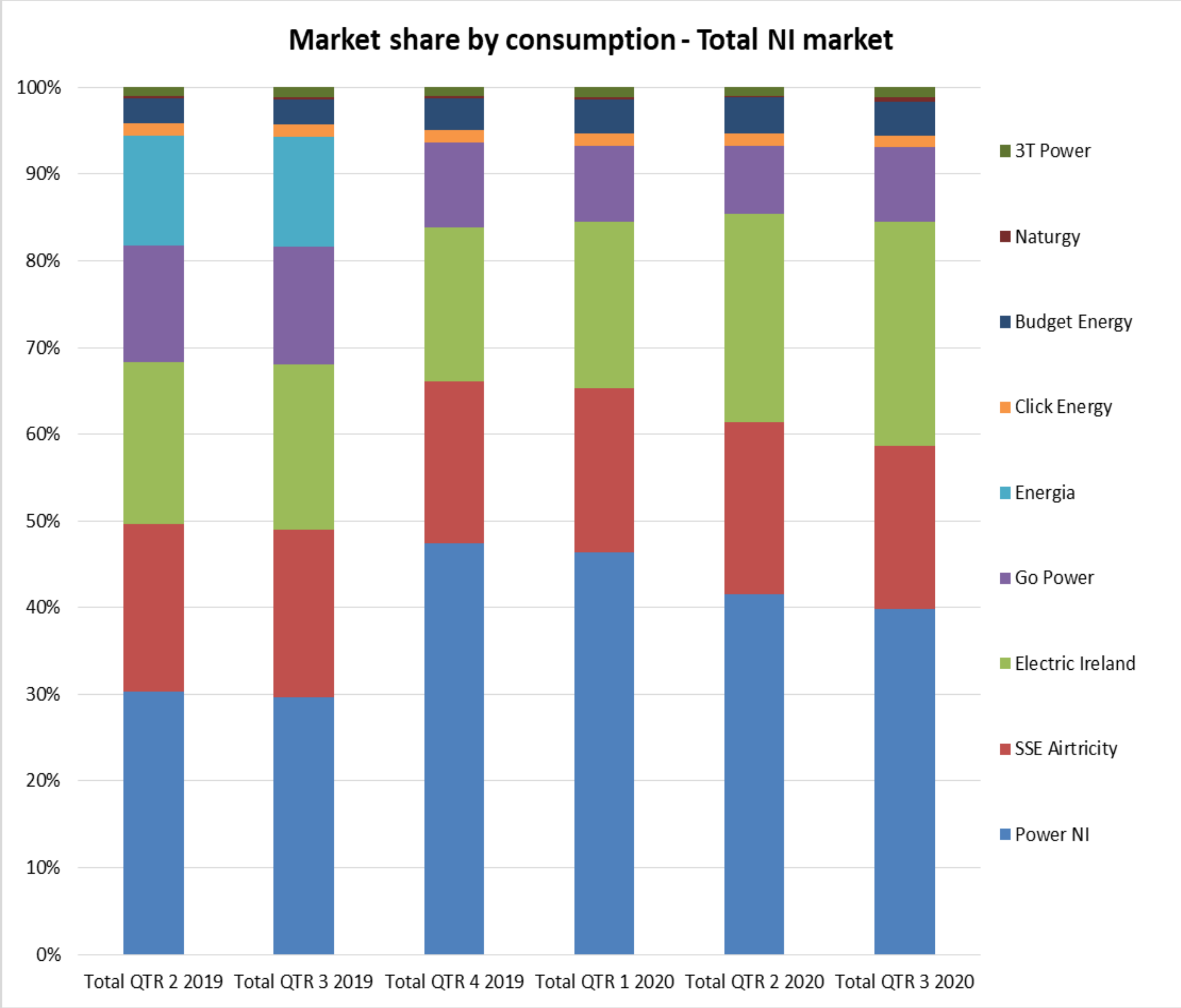
Q3 2020

Total Market	Total	
	GWh	%
Power NI	675.8	39.8%
SSE Airtricity	320.3	18.9%
Electric Ireland	437.4	25.8%
Go Power	146.7	8.6%
Click Energy	23.9	1.4%
Budget Energy	66.0	3.9%
Naturgy	9.0	0.5%
3T Power	18.7	1.1%
Total Market	**1,697.8**	**100%**

Source: NIEN

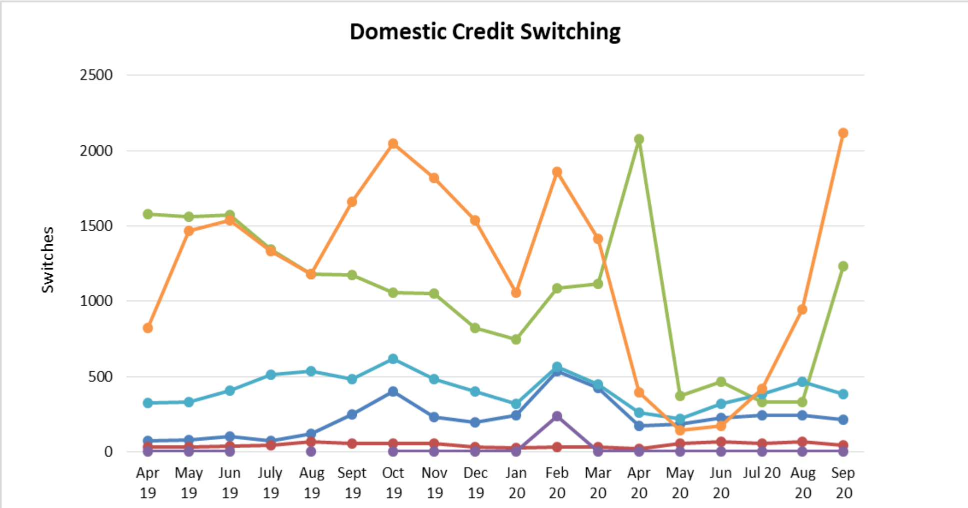
Electricity consumption in NI retail market for Q3 2020 was over 1,697.8 GWh, which indicates a year on year decrease when compared to 1,731.7 GWh consumed in Q3 2019.

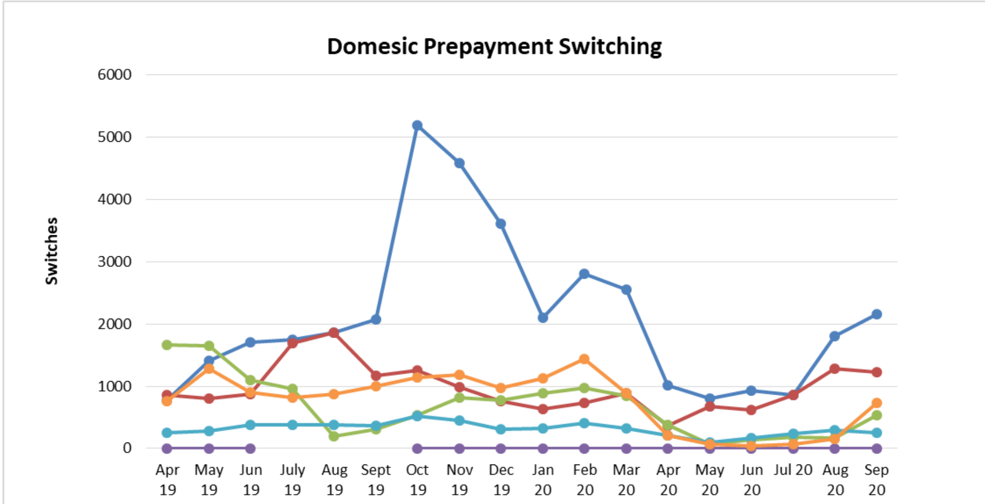
The graph to the right reflects the trends in market shares (by total consumption) for each active domestic and I&C supplier in NI for the previous six quarters.

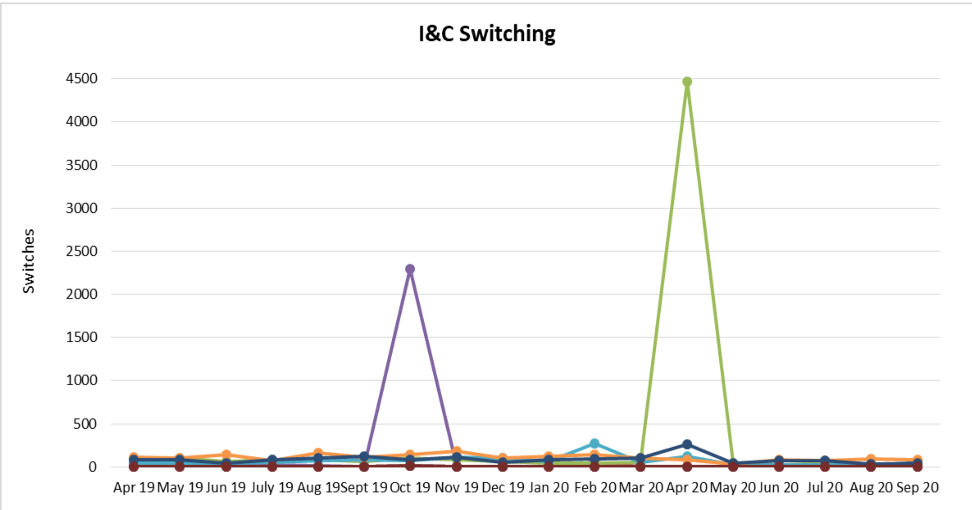


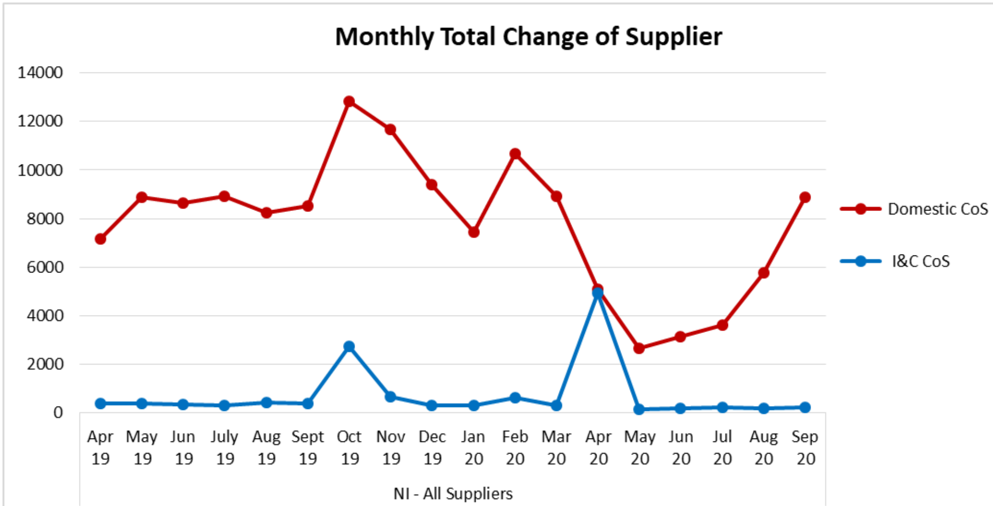
3.3 Electricity market activity

The line charts below reflect the change of customer numbers (gains per supplier), per market segment and anonymised supplier.









The table below shows market activity through changes of supplier (CoSs) on a quarterly basis in the whole NI market split by domestic and I&C. These percentages are calculated using the number of quarterly switches divided by the number of customers at the end of the quarter in the relevant market.

Table 10 Electricity market activity

Q3 2020

Period	Domestic Switching		I&C Switching		Total Switching	
2019 Q2	24,673	3.0%	1,100	1.5%	25,773	2.9%
2019 Q3	25,690	3.2%	1,174	1.6%	26,864	3.0%
2019 Q4	33,895	4.2%	3,752	5.0%	37,647	4.2%
2020 Q1	27,061	3.3%	1,262	1.7%	28,323	3.2%
2020 Q2	10,919	1.3%	5,329	7.2%	16,248	1.8%
2020 Q3	18,287	2.2%	687	0.9%	18,974	2.1%

Source: NIEN

The number of domestic switches over this quarter increased from the previous quarter, with an average of c6,100 switches per month compared to c3,600 switches per month for the previous quarter.

The percentage of domestic switching for Q3 2020 has increased from 1.3% to 2.2%.The I&C market activity saw a decrease from 7.2% in Q2 2020 to 0.9% in Q3 2020.

3.4 Electricity prices

For the electricity prices section, we follow Eurostat's format and methodology. As a result the average prices for NI are comparable with prices in other EU countries (those published in BEIS's Quarterly Energy Prices reports[5] and Eurostat data base[6]) once these figures have been converted to GBP.

The base figures are all submitted on a quarterly basis by suppliers, split by domestic and non-domestic (I&C). The UR performs a high level reasonableness check of the base figures, but the suppliers are responsible for the accuracy of the information that is provided to the UR. The base figures are as follows:

- **Volume** of electricity sold to consumers.
- The **value**, or revenue gained from the sale, split into three categories: excluding all taxes, excluding VAT, and including all taxes.
- The **number** of customers supplied in that particular size category.

The volume and value are used to calculate a NI quarterly average value per size band. This value per unit (per size band) is what we refer to in this paper as "price". For clarity we do not receive from suppliers the actual price paid by their customers. Instead we calculate the average value or revenue collected per unit in that particular size category, as per the Eurostat methodology.

As the Eurostat figures are published on a semester basis (semester 1 (S1) January to June and semester 2 (S2) July to December) we therefore average the two relevant quarters to obtain

[5] https://www.gov.uk/government/collections/quarterly-energy-prices

[6] http://ec.europa.eu/eurostat/web/energy/data/database

the comparable six-month period for NI.

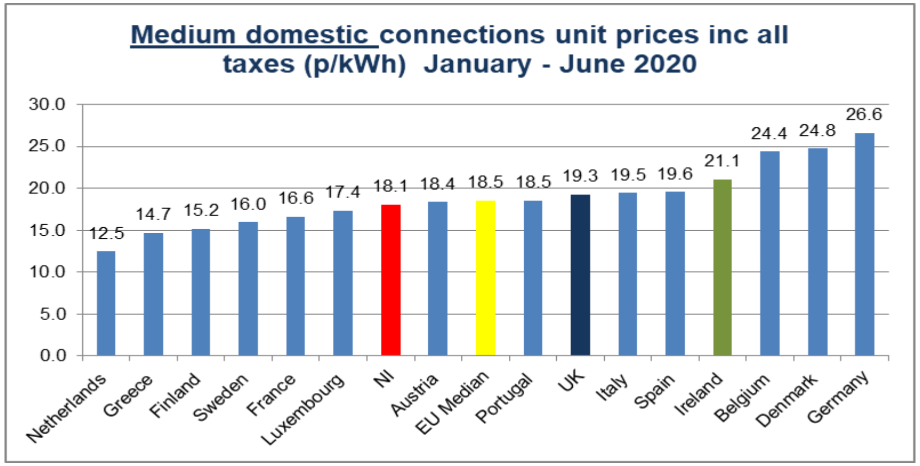
It should be noted that the comparability of the derived NI prices to the other Member States can be greatly affected by fluctuations in the Euro GBP exchange rate. For the purposes of tariff comparisons we convert the EU tariff data from Euro to GBP using the monthly average exchange rate applicable for the semester (published by Eurostat). Therefore tariff movements and comparisons between NI and other Member States can be impacted by both an increase and decrease in a tariff and/or also by any variation in exchange rates.

The pricing data detailed in this QTR is for the semester 1 January 2020 – 30 June 2020.

Domestic price comparison with EU

In the domestic graph shown below, we use unit prices which include Climate Change Levy (CCL) and include VAT as this reflects the final prices paid by domestic Customers. The medium sized domestic customers (annual consumption of between 2,500 and 4,999 kWh) have been selected for the purpose of analysis, as this consumption category reflects the majority of domestic customers in NI.

In S1 2020 the NI price was below the EU median, less than that of GB and considerably less than RoI.



I&C price comparison with EU

The following graphs show I&C electricity prices in the 15 EU[7] countries (converted to GBP) and in NI, per consumption size bands (following standard EU categorisation). The I&C graphs use unit prices which include Climate Change Levy (CCL) but exclude VAT, as VAT is a refundable expense for many businesses. This reflects the final prices paid by I&C customers. We amalgamate the two largest categories of annual consumption (large and very large connections) to avoid any confidentiality issues in sectors where there are a small number of customers and suppliers involved.

For the Very Small I&C Category[8] the NI prices are lower than the rest of the UK, the EU median and significantly lower than RoI (c69%% of I&C connections in NI are in this size category). For large and very large I&C customers (c0.02% of connections) NI prices are just above RoI and the EU median but lower than the UK.

[7] Some graphs do not include all 15 EU countries due to availability of data from Eurostat.

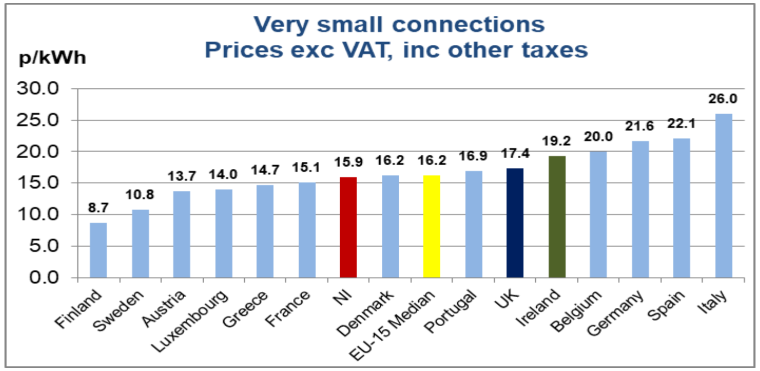
[8] At the time of publication data was unavailable for the Netherlands Very Small Connections <20MWh. The Netherlands is therefore removed from this graph.

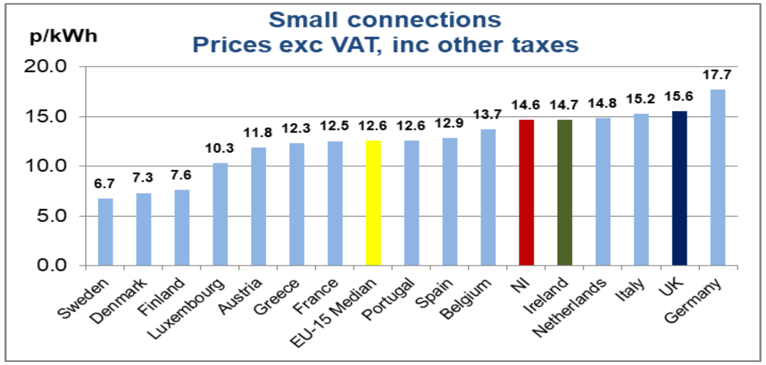
Table 11 Electricity market % by I&C consumption band

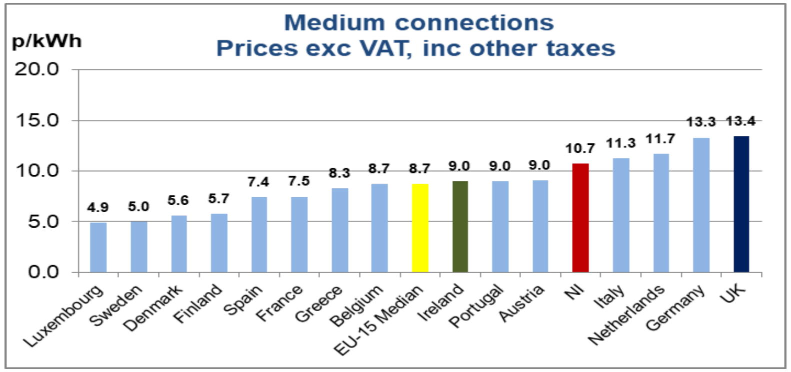
End of Q2 2020[9]

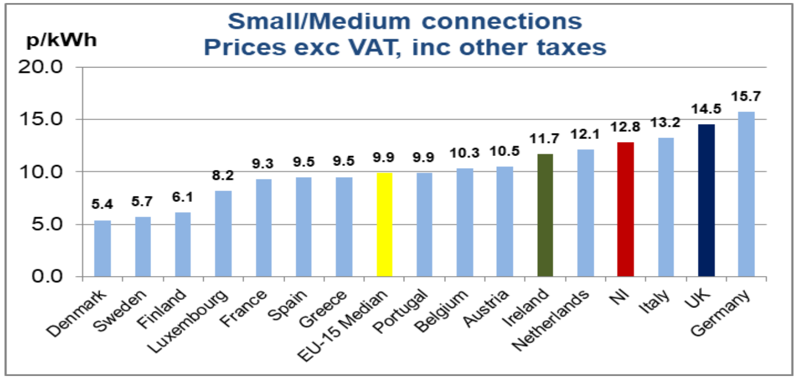
Size of customer	Annual consumption bands (MWh)	% of I&C connections[10]	% of I&C consumption	I&C connection numbers
Very small	< 20	68.6%	7.0%	50,628
Small	20 – 499	30.0%	32.0%	22,139
Small / Medium	500 – 1,999	1.0%	15.5%	761
Medium	2,000 – 19,999	0.3%	29.8%	249
Large & Very Large	>20,000	0.02%	15.7%	18

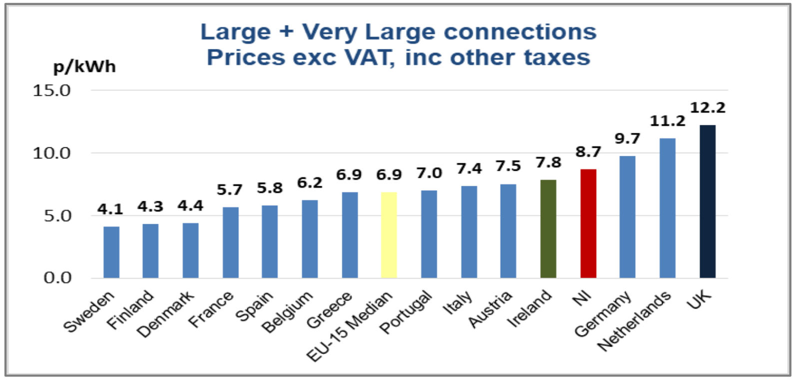
Source: NIEN







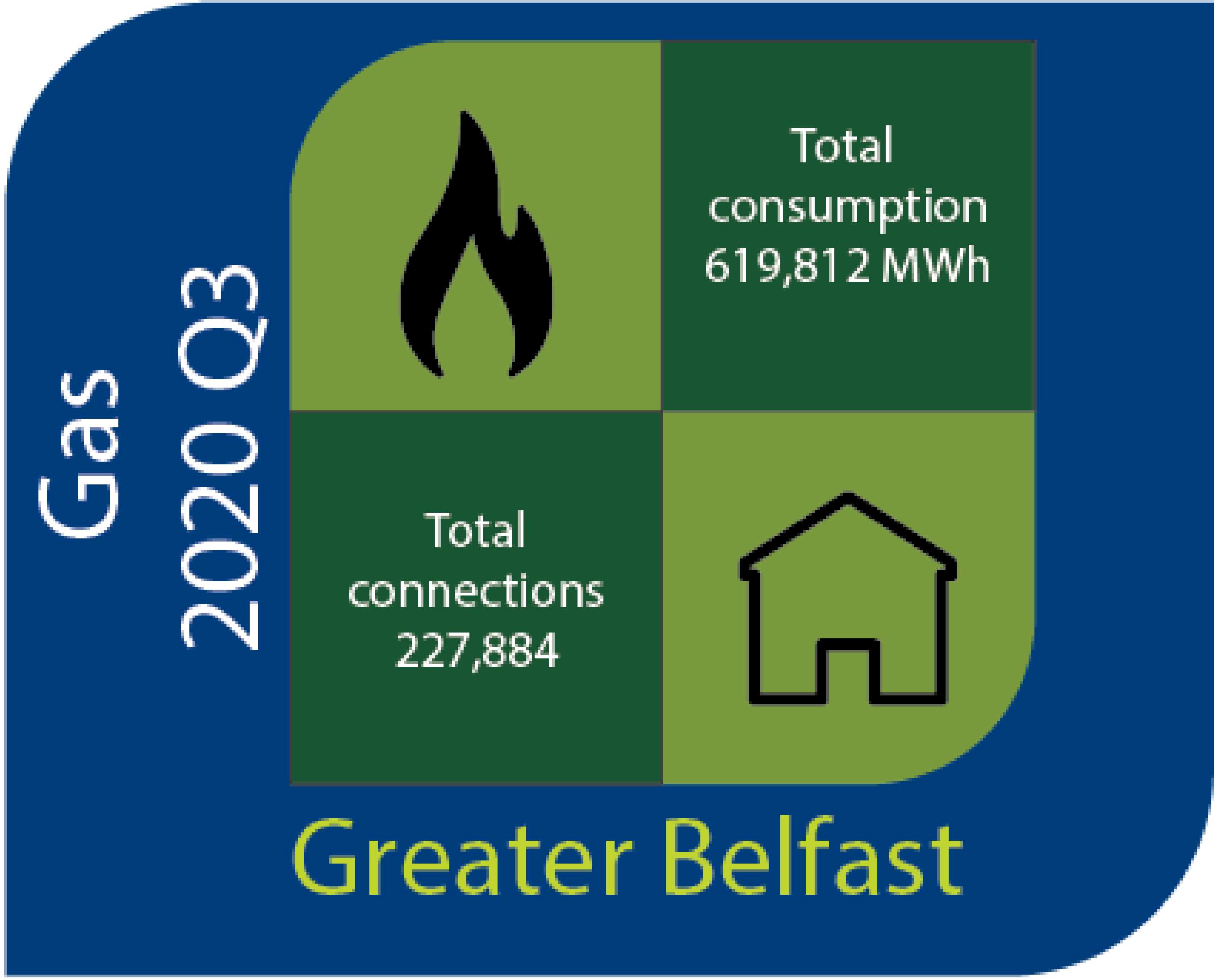




Source: NI electricity suppliers, Eurostat and UR internal calculations

[9] The pricing data relates period end Q2 2020 (S1 January – June 2020) as opposed to Q3 2020. This is due to the availability of pricing data from Eurostat and suppliers.

4 Gas in the Greater Belfast area (PNGL)



4.1 Connections and consumption in the Greater Belfast area

The table below shows gas connection numbers in the Greater Belfast area at the end of September 2020 and the consumption in this area during July to September 2020.

Table 12 Gas connections and consumption per market segment in the Greater Belfast area

Q3 2020

Market sector	Number of connections	% share of connections in sector	Consumption (MWh)[11]	% share of consumption in sector
Domestic prepayment	139,170	61.9%	138,091	49.9%
Domestic credit	77,362	34.4%	138,785	50.1%
I&C < 73,200 kWh	8,119	3.6%		
Total Domestic and Small I&C[12]	**224,651**	**100%**	**276,876**	**100%**
I&C 73,200 to 732,000 kWh	2,836	87.7%	95,774	27.9%
I&C 732,001 to 2,196,000 kWh	281	8.7%	36,681	10.7%
I&C > 2,196,000 kWh	116	3.6%	210,481	61.4%
Medium & Large I&C[13]	**3,233**	**100%**	**342,936**	**100%**
Total	**227,884**		**619,812**	

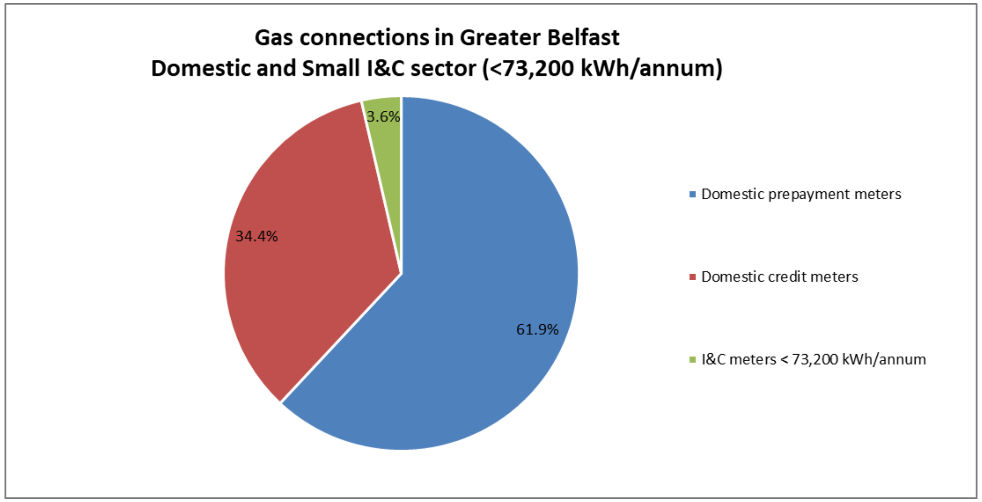
Source: PNGL

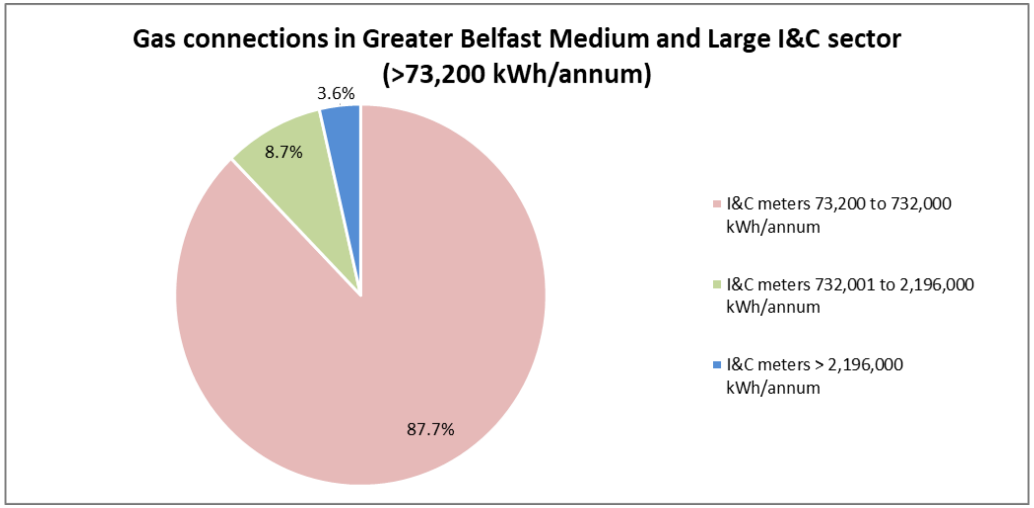
At the end of September 2020, the domestic and small I&C connections represent 98.6% of the total connections and 44.7% by consumption. The remaining 1.4% of connections are medium and large I&C which represent 55.3% of consumption.

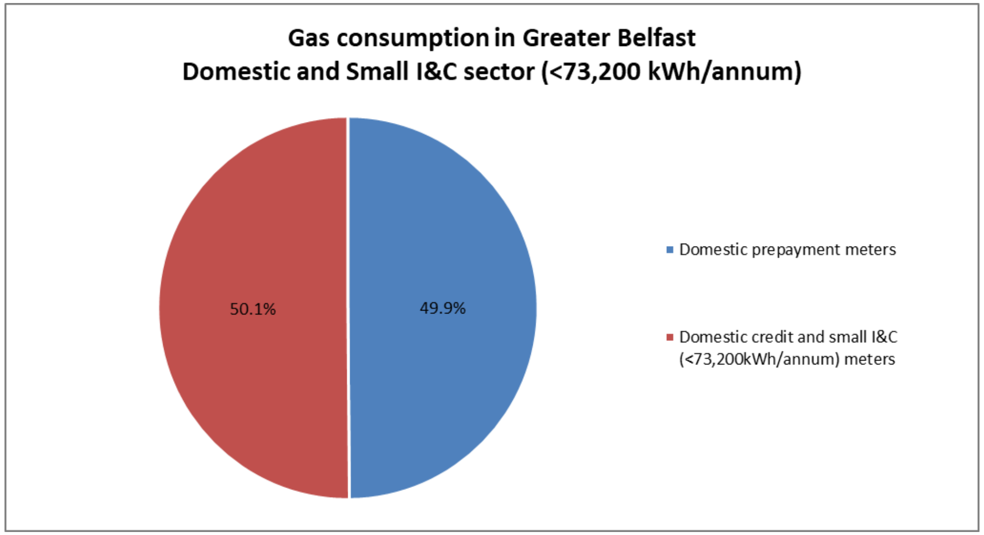
Within the domestic sector, 64.3% of the connections use prepayment meters and 35.7% use credit meters to pay for their gas.

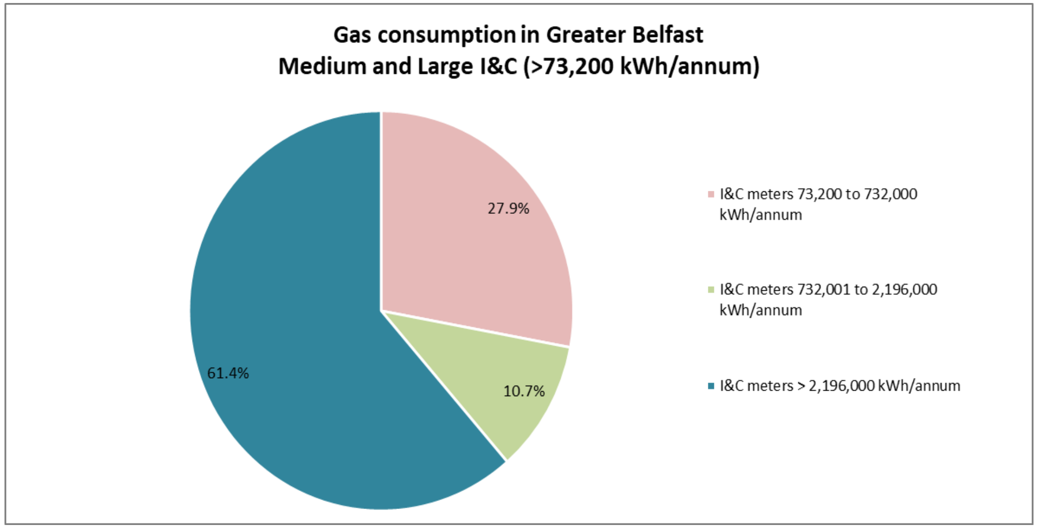
[11] Gas consumption is presented in MWh (previously up to 2015 gas consumption was presented in Therms in the QTRs.
[12] The domestic and small I&C sector relates to any customers using less than 73,200 kWh per annum. The consumption information for domestic credit and small I&C are combined as this information is not available separately.
[13] The medium and large I&C sector relates to any customers with annual consumption that is greater than or equal to 73,200 kWh per annum.

The charts below show the numbers of gas connections in the Greater Belfast area at the end of September 2020 and the consumption in this area during July to September 2020.









4.2 Gas market shares in the Greater Belfast area

This section provides information on the connection numbers and consumption, by supplier, in the Greater Belfast area. The market shares in terms of connections are as at the end of September 2020 and the market shares in terms of consumption are for the period July to September 2020. There are five suppliers in the domestic and small I&C sector, although only two of these suppliers are active in the domestic market. In the medium and large I&C market there are currently six active suppliers.

Gas shares by connections numbers

The table below shows the market shares for each supplier within the domestic and small I&C sector in the Greater Belfast area. The market shares are shown as number of connections per supplier and also as a percentage share within the sector (as at the end of September 2020).

Table 13 Domestic and small I&C[14] market shares by connections

End of Q3 2020

Supplier	Domestic prepayment		Domestic Credit		I&C < 73,200 kWh		Total for Domestic and Small I&C	
SSE Airtricity	103,927	74.7%	64,141	82.9%	5,205	64.1%	**173,273**	**77.1%**
firmus energy	35,243	25.3%	13,214	17.1%	1,318	16.2%	**49,775**	**22.2%**
Naturgy	-	0.0%	0	0.0%	4	0.1%	**4**	**0.0%**
Go Power	-	0.0%	7	0.01%	723	8.9%	**730**	**0.3%**
Flogas	-	0.0%	0	0.0%	869	10.7%	**869**	**0.4%**
Total	**139,170**	**100%**	**77,362**	**100%**	**8,119**	**100%**	**224,651**	**100%**

Source: PNGL

In terms of market shares by connections, SSE Airtricity (the incumbent supplier) retains a significant share of the domestic and small I&C market of currently 77.1%.

[14] The domestic and small I&C sector relates to any customers using less than 73,200 kWh per annum.

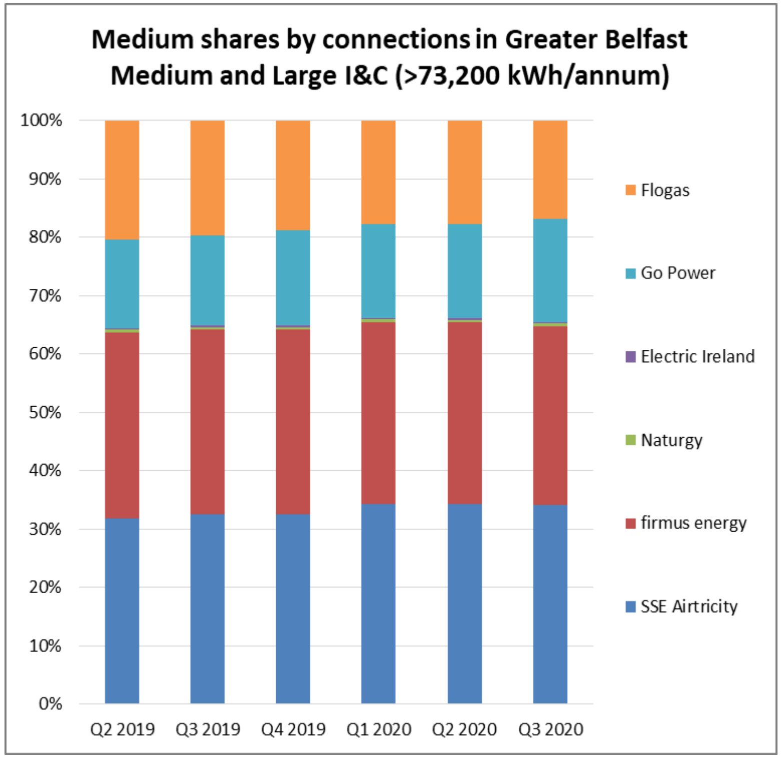
The table below shows the market shares for each supplier within the medium and large I&C sector (i.e. I&Cs with consumption over 73,200 kWh per annum) in the Greater Belfast area at the end of September 2020. The corresponding graph shows the change in market shares by supplier within the same sector over the last eighteen months.

Table 14 Medium and large I&C[15] market shares by connections

End of Q3 2020

Supplier	I&C 73,200 to 732,000 kWh		I&C 732,001 to 2,196,000 kWh		I&C > 2,196,000 kWh		Total for Medium and Large I&C	
SSE Airtricity	970	34.2%	93	33.1%	37	31.9%	**1,100**	**34.0%**
firmus energy	868	30.6%	91	32.4%	35	30.2%	**994**	**30.7%**
Naturgy	12	0.4%	-	0.0%	2	1.7%	**14**	**0.4%**
Electric Ireland	-	0.0%	-	0.0%	7	6.0%	**7**	**0.2%**
Go Power	468	16.5%	71	25.3%	35	30.2%	**574**	**17.8%**
Flogas	518	18.3%	26	9.3%	-	0.0%	**544**	**16.8%**
							0	
Total	**2,836**	**100%**	**281**	**100%**	**116**	**100%**	**3,233**	**100%**

Source: PNGL



Competition in the medium and large I&C market is more active in the Greater Belfast area. At the end of Q3 2020, SSE and firmus continue to have the majority share of the medium and large I&C market, with 34.0% and 30.7% respectively. Out of the six active suppliers at the end of Q3 2020, based on connections, four of these have market shares in excess of 15% of the total I&C market.

15 The medium and large I&C sector relates to any customers with annual consumption that is greater than or equal to 73,200 kWh per annum.

Gas shares by consumption[16]

This section provides information on the consumption, by supplier, in the Greater Belfast area during Q3 2020. The table below shows the market shares for each supplier within the domestic and small I&C sector in the Greater Belfast area.

Table 15 Domestic and small I&C[17] market shares by consumption

Q3 2020

Supplier	Total for Domestic and Small I&C Sector (MWh)	% share
SSE Airtricity	**208,047**	**75.1%**
firmus energy	**64,476**	**23.3%**
Naturgy	**9**	**0.003%**
Go Power	**1,894**	**0.7%**
Flogas	**2,449**	**0.9%**
Total	**276,876**	**100%**

Source: PNGL

SSE Airtricity has retained the majority of the domestic and small I&C market share in the Greater Belfast area. Based on consumption their percentage market share in Q3 2020 was 75.1% compared with 74.0% in the same period last year. firmus energy's market share for the period Q3 2020 was 23.3% (compared with 24.3% for the same period the previous year).

The market share of the remaining suppliers based on consumption levels continues to be minimal as they are not active in the domestic market and supply only to a limited number of small I&C customers.

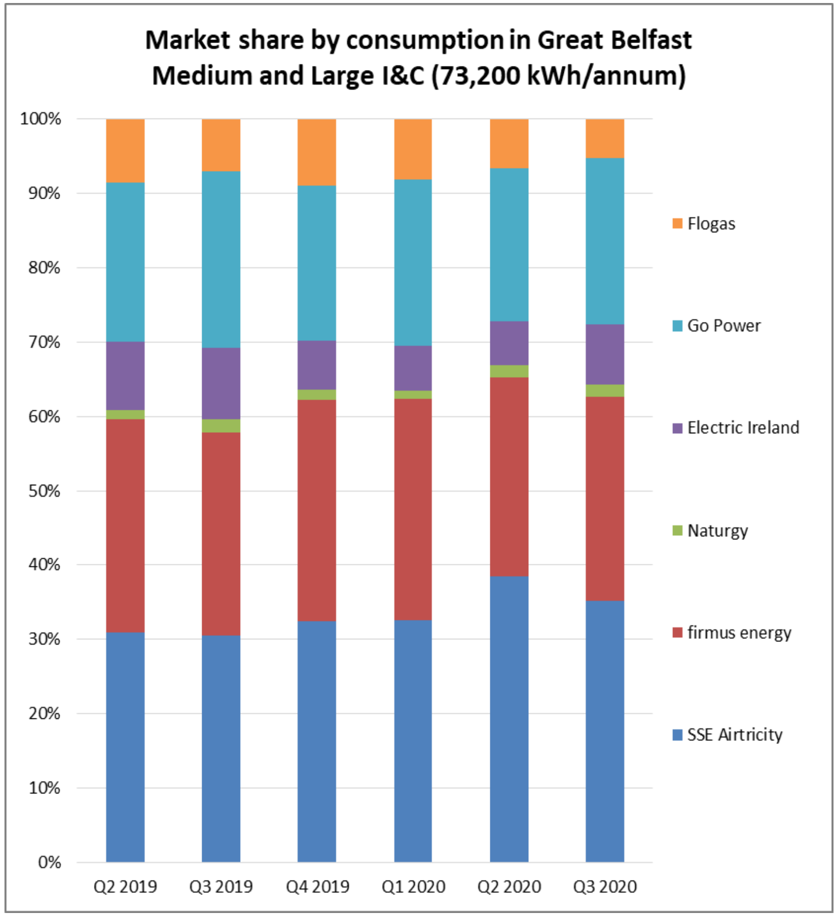
[16] Gas consumption is presented in this QTR in MWh.
[17] The domestic and small I&C sector relates to any customers using less than 73,200 kWh per annum.

The table below shows the market shares for each supplier within the medium and large I&C sector (i.e. those using at least 73,200 kWh per annum) in the Greater Belfast area during Q3 2020. The corresponding graph shows the change in market shares by supplier within the same sector over the last eighteen months.

Table 16 Medium and large I&C[18] market shares by consumption
Q3 2020

Supplier	I&C 73,200 to 732,000 kWh		I&C 732,001 to 2,196,000 kWh		I&C > 2,196,000 kWh		Total for Medium and Large I&C	
	(MWh)	% share	(MWh)	% share	(MWh)	% share	(MWh)	% share
SSE Airtricity	32,545	34.0%	16,185	44.1%	71,810	34.1%	**120,540**	**35.2%**
firmus	31,170	32.6%	8,436	23.0%	54,411	25.9%	**94,017**	**27.4%**
Naturgy	266	0.3%	-	0.0%	5,621	2.7%	**5,887**	**1.7%**
Electric Ireland	-	0.0%	-	0.0%	27,562	13.1%	**27,562**	**8.0%**
Go Power	16,090	16.8%	9,695	26.4%	51,077	24.3%	**76,861**	**22.4%**
Flogas	15,703	16.4%	2,366	6.5%	0	0.0%	**18,069**	**5.3%**
Total	**95,774**	**100%**	**36,681**	**100%**	**210,481**	**100%**	**342,936**	**100%**

Source: PNGL



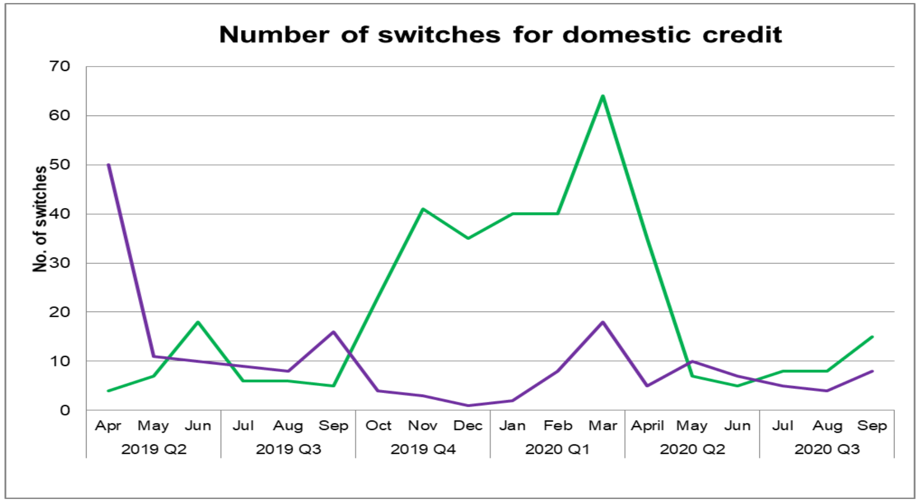
Market share by consumption fluctuates throughout the year due to the movement of customers between suppliers, and also due to the amount of gas consumed by each customer during different seasons (as gas usage can be weather dependent for many, but not all, customers).

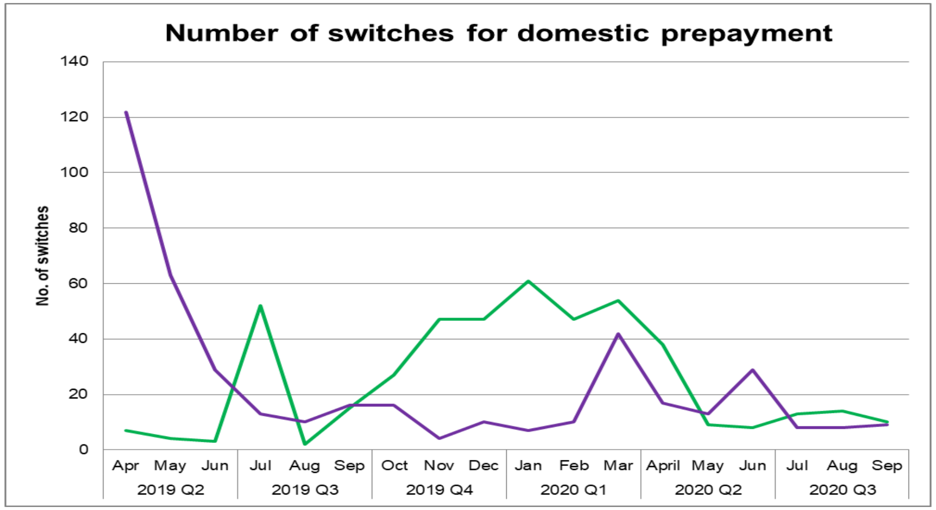
Go Powers market share by consumption in the medium and large I&C market has increased from 20.6% in Q2 2020 to 22.4% in Q3 2020. SSE Airtricity and firmus energy both have the majority share by consumption in the medium and large I&C market with 35.2% and 27.4% respectively.

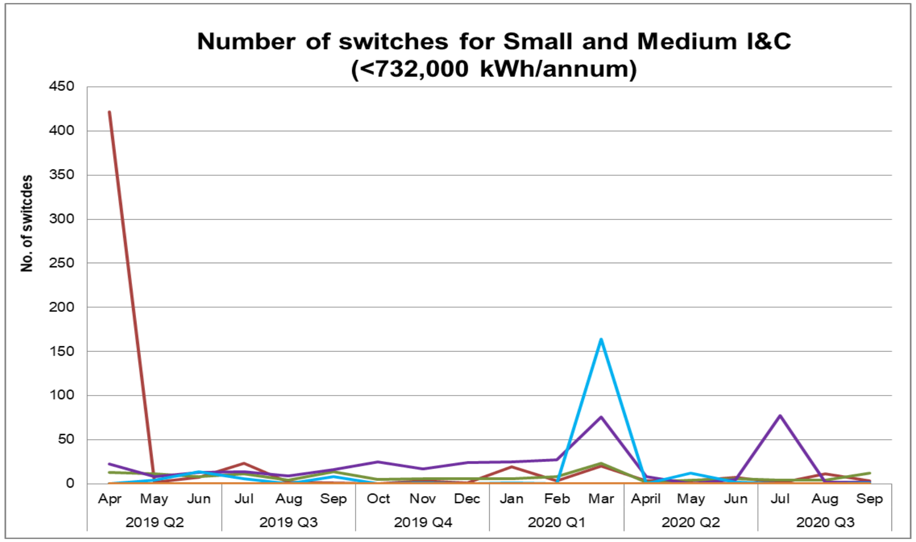
[18] The medium and large I&C sector relates to any customers with annual consumption that is greater than or equal to 73,200 kWh per annum.

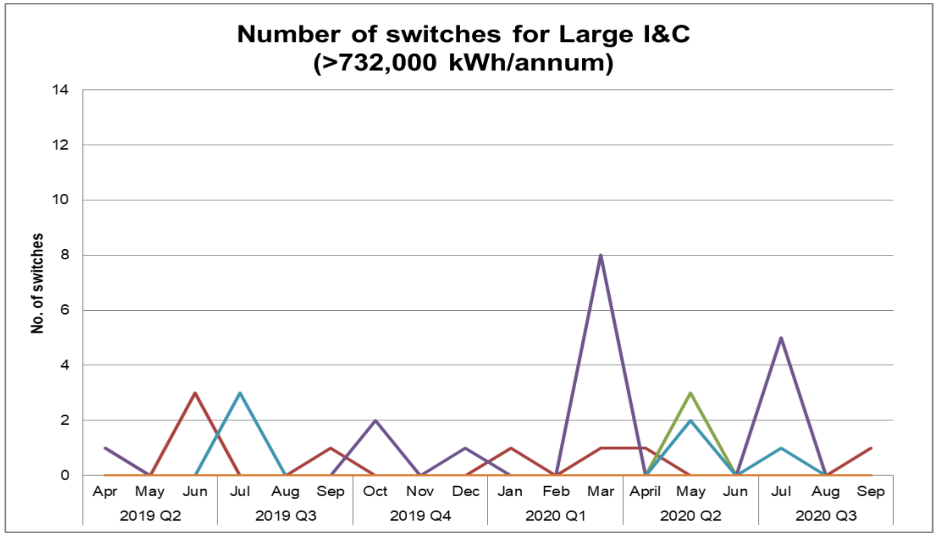
4.3 Market activity in the Greater Belfast area

The line charts below reflect the number of switching gains per market sector in the Greater Belfast area. The switching gains are displayed by supplier; however the supplier names have been anonymised. Note that prepayment switches, within the domestic sector, include switches back to the previous supplier in cases where the customer has not taken the required action to complete their switch.









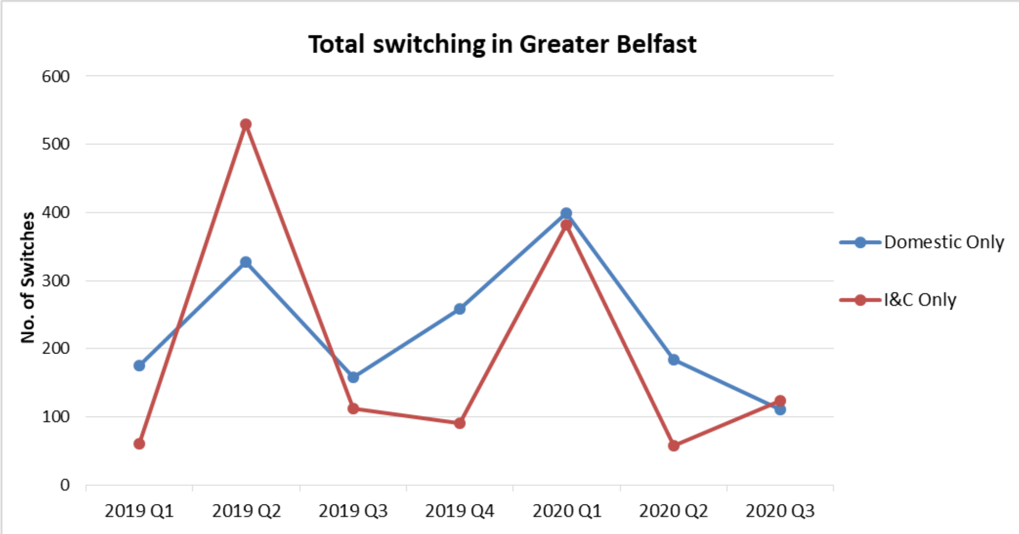
There are only two active suppliers in the domestic market. The I&C graphs above represent the split between the small and medium I&C customers (i.e. customers consuming less than 732,000 kWh per annum) and large I&C consumers (i.e. consuming more than 732,000 kWh per annum).

The table below shows market activity through the number of customer switches on a quarterly basis in the Greater Belfast gas market and the associated percentage switching rate. The switching rate percentages are calculated using the number of quarterly switches divided by the number of customers at the end of the quarter in the relevant market.

Table 17 Quarterly market activity in the Greater Belfast area

Period	Domestic Switching		I&C Switching		Total Switching	
2019 Q2	328	0.2%	529	4.7%	857	0.4%
2019 Q3	158	0.1%	112	1.0%	270	0.1%
2019 Q4	258	0.1%	91	0.8%	349	0.2%
2020 Q1	399	0.2%	382	3.4%	781	0.4%
2020 Q2	184	0.1%	58	0.5%	242	0.1%
2020 Q3	110	0.1%	124	1.1%	234	0.1%

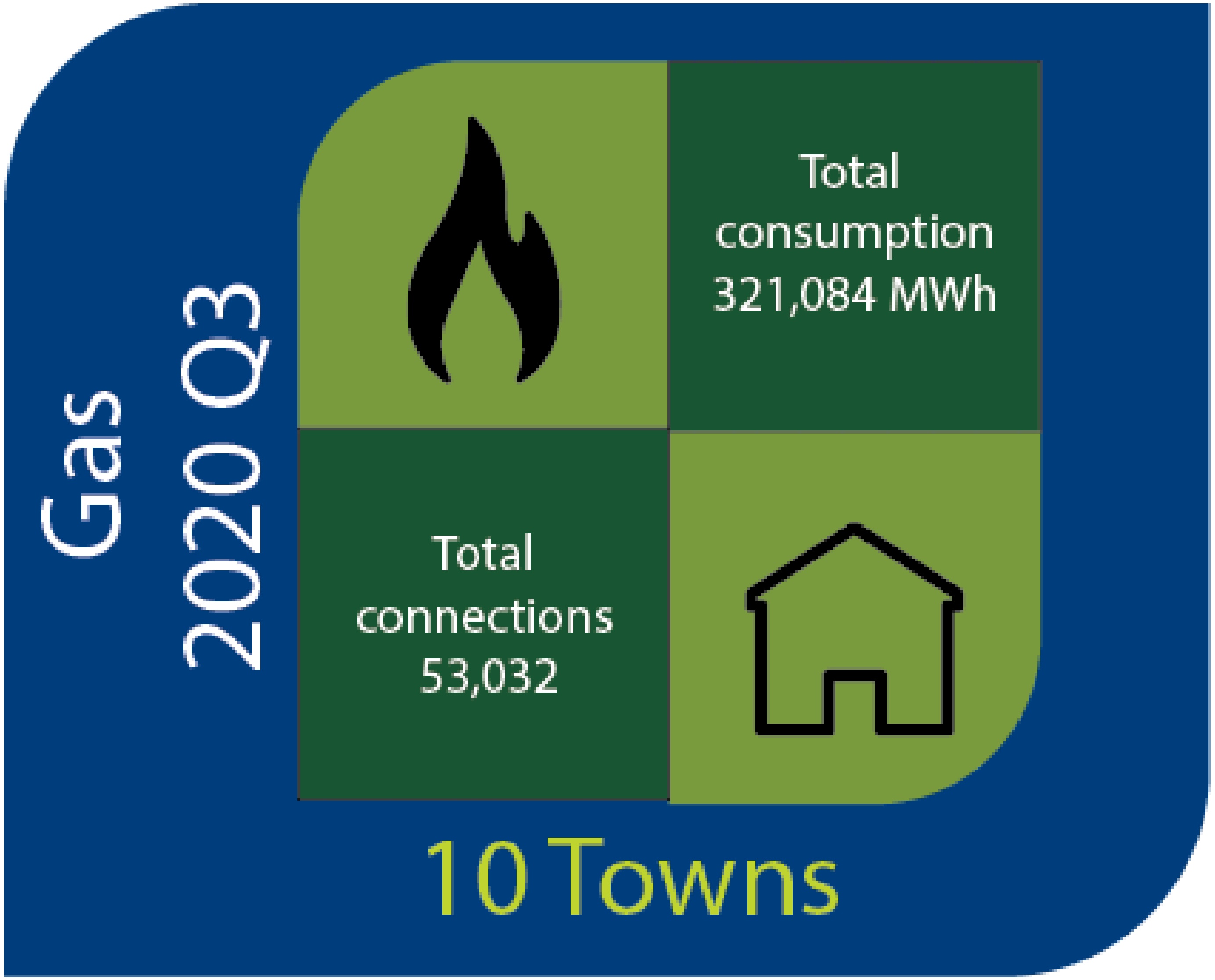
Source: PNGL



The graph to the right represents the total number of switches completed on a quarterly basis, split by the domestic and I&C markets. The graph shows that the overall level of switching has been consistently low over the last year.

The domestic switching for the period Q3 2020 remained similar to Q2 2020 at 0.1%. I&C switching saw an increase from 0.5% to 1.1% over the same period.

5 Gas in the Ten Towns area (FeDL)



5.1 Connections and consumption in the Ten Towns area

The table below shows gas connection numbers in the Ten Towns area at the end of September 2020 and the consumption in this area during July to September 2020.

Table 18 Gas connections and consumption per market segment in the Ten Towns area

Q3 2020

Market segment	Number of connections	% share of connections in sector	Consumption (MWh)[19]	% share of consumption in sector
Domestic prepayment	41,680	80.5%	43,208	77.2%
Domestic credit	8,557	16.5%	12,780	22.8%
I&C < 73,200 kWh	1,510	2.9%		
Total Domestic and Small I&C[20]	**51,747**	**100%**	**55,988**	**100%**
I&C 73,200 to 732,000 kWh	1,037	80.7%	39,421	14.9%
I&C 732,001 to 2,196,000 kWh	160	12.5%	23,776	9.0%
I&C > 2,196,000 kWh	88	6.8%	201,899	76.2%
Medium & Large I&C[21]	**1,285**	**100%**	**265,096**	**100%**
Total	**53,032**		**321,084**	

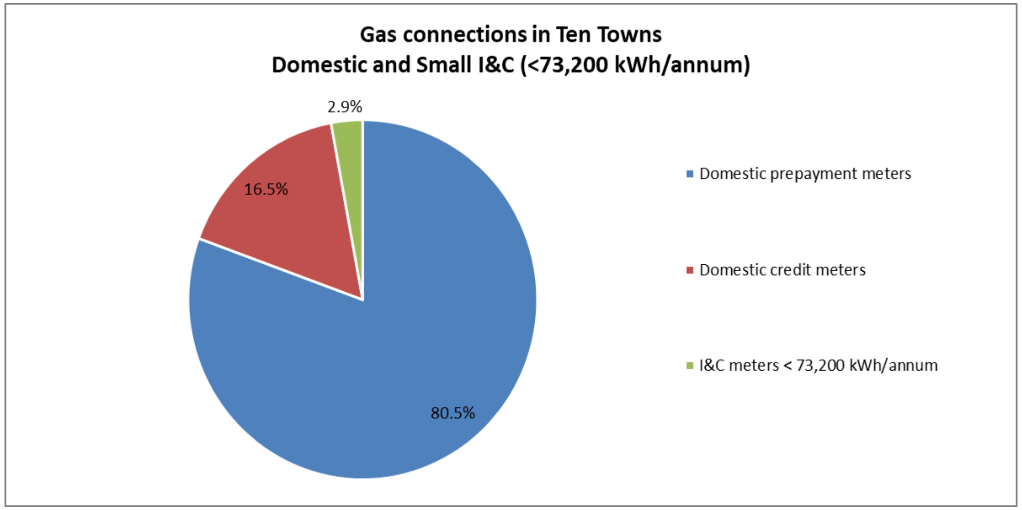
Source: feDL

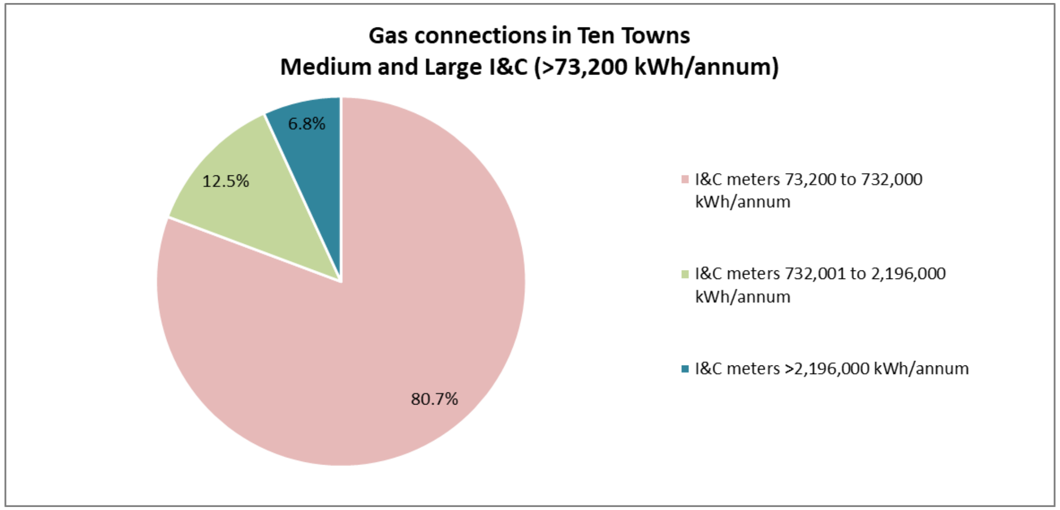
At the end of September 2020, the domestic and small I&C connections represent 97.6% of the total connections and 17.4% of consumption. The remaining 2.4% are medium and large I&C connections and represent 82.6% of total consumption in this area.

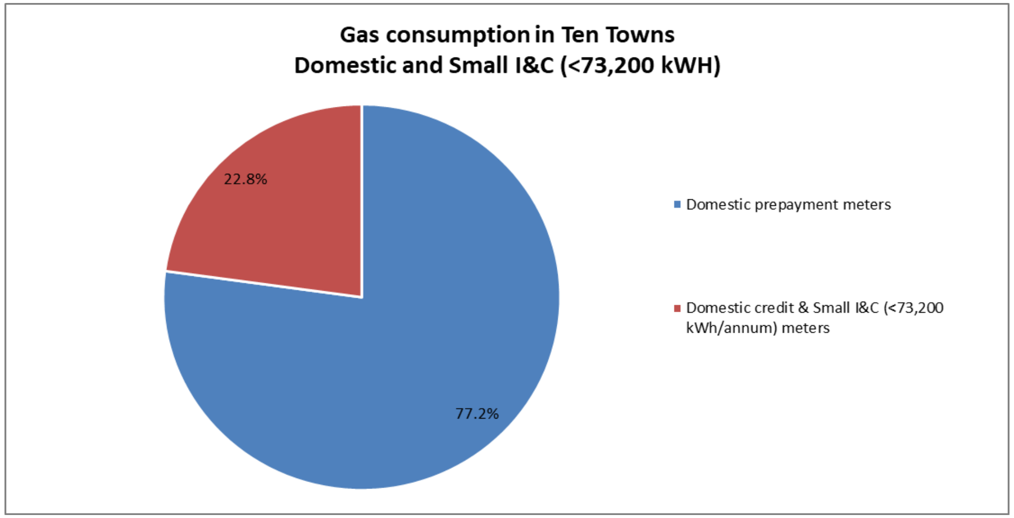
Within the domestic sector, 83.0% of the domestic connections use prepayment meters and 17.0% use credit meters to pay for their gas.

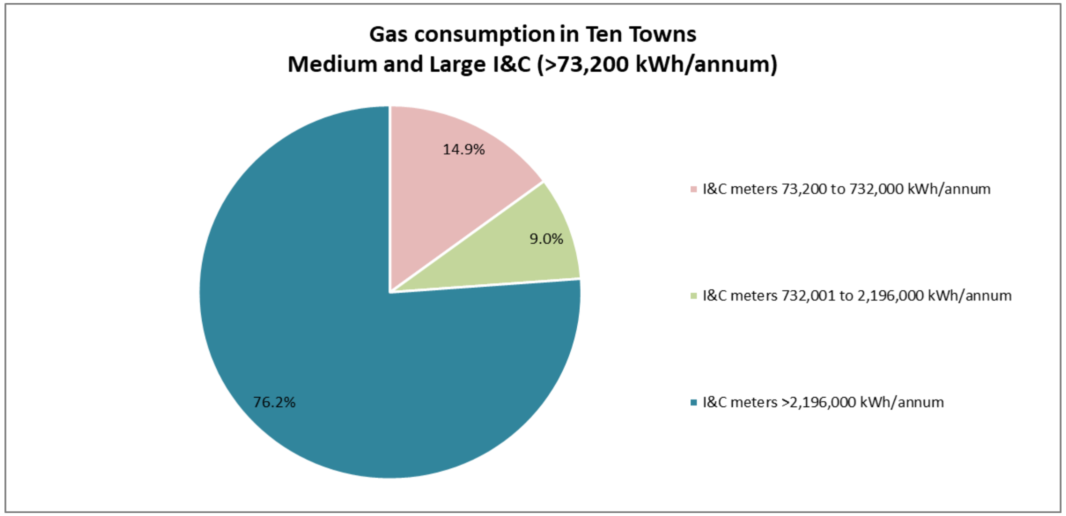
The charts on the following page show the numbers of gas connections in the Ten Towns area at the end of September 2020 and the consumption in this area during July to September 2020.

[19] Gas consumption is presented in this QTR in MWh. It is important to note that gas consumption was presented in Therms in the QTRs for 2015 and previous years.
[20] The domestic and small I&C sector relates to any customers using less than 73,200 kWh per annum. The consumption information for domestic credit and small I&C are combined as this information is not available to us with a full split.
[21] The medium and large I&C sector relates to any customers with annual consumption that is greater than or equal to 73,200 kWh per annum.


Gas connections in Ten Towns
Domestic and Small I&C (<73,200 kWh/annum)
2.9%
16.5%
80.5%
Domestic prepayment meters
Domestic credit meters
I&C meters < 73,200 kWh/annum


Gas connections in Ten Towns
Medium and Large I&C (>73,200 kWh/annum)
6.8%
12.5%
80.7%
I&C meters 73,200 to 732,000 kWh/annum
I&C meters 732,001 to 2,196,000 kWh/annum
I&C meters >2,196,000 kWh/annum


Gas consumption in Ten Towns
Domestic and Small I&C (<73,200 kWH)
22.8%
77.2%
Domestic prepayment meters
Domestic credit & Small I&C (<73,200 kWh/annum) meters


Gas consumption in Ten Towns
Medium and Large I&C (>73,200 kWh/annum)
14.9%
9.0%
76.2%
I&C meters 73,200 to 732,000 kWh/annum
I&C meters 732,001 to 2,196,000 kWh/annum
I&C meters >2,196,000 kWh/annum

5.2 Gas market shares in the Ten Towns area

This section provides information on the connection numbers and consumption, by supplier, in the Ten Towns area. The market shares in terms of connections are as at the end of September 2020 and the market shares in terms of consumption are for the period July to September 2020.

Competition opened in the Ten Towns large I&C market (>732,000 kWh per annum) in October 2012. The remainder of the market opened to competition in April 2015. There were four suppliers in the domestic and small I&C sector during Q3 2020, although only one supplier was active in the domestic market (the incumbent supplier). In the medium and large I&C market there were six active suppliers.

Gas shares by connections numbers

The table below shows the market shares for each supplier within the domestic and small I&C sector in the Ten Towns area.

Table 19 Domestic and small I&C[22] market shares by connections

End of Q3 2020

Supplier	Domestic prepayment		Domestic credit		I&C < 73,200 kWh		Total for Domestic and Small I&C	
SSE Airtricity	0	0.0%	0	0.0%	97	6.4%	**97**	**0.2%**
firmus energy	41,680	100.0%	8,557	100.0%	990	65.6%	**51,227**	**99.0%**
Go Power	0	0.0%	0	0.0%	128	8.5%	**128**	**0.2%**
Flogas	0	0.0%	0	0.0%	295	19.5%	**295**	**0.6%**
Total	**41,680**	**100%**	**8,557**	**100%**	**1,510**	**100%**	**51,747**	**100%**

Source: feDL

firmus energy, the incumbent supplier, is the only domestic supplier in the Ten Towns area. In terms of market share by connections, firmus energy retains the majority of the small I&C market with 65.6% share at the end of Q3 2020. The competing suppliers in the small I&C market, SSE Airtricity, Go Power and Flogas have been steadily increasing their market shares since entering the I&C market. At the end of Q3 2020, the collective market share of these three suppliers was 34.4%.

[22] The domestic and small I&C sector relates to any customers using less than 73,200 kWh per annum.

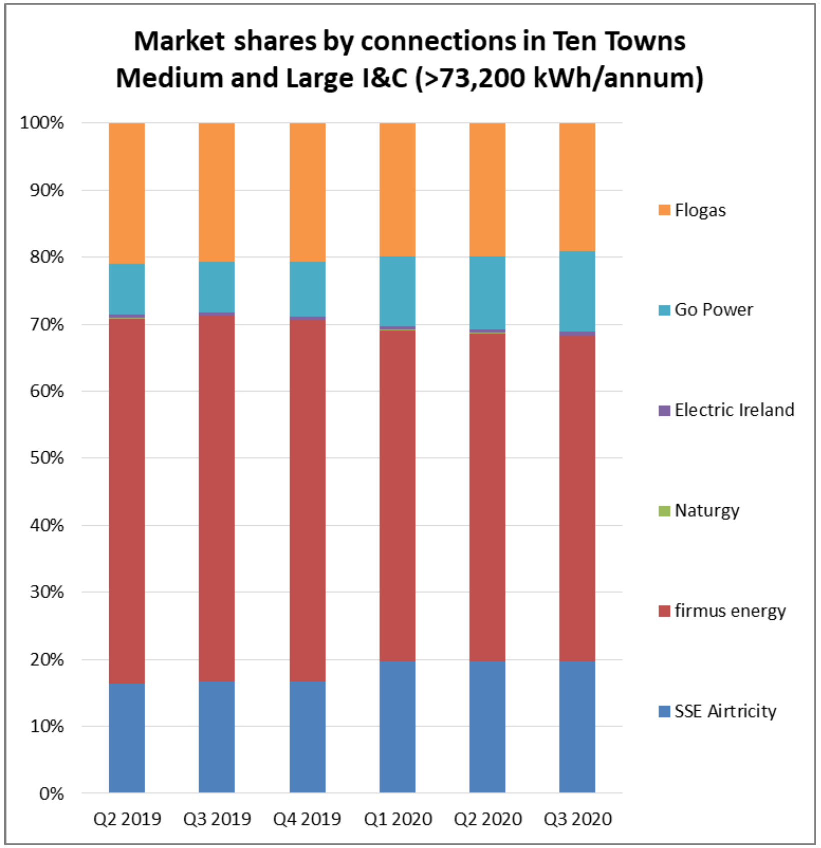
The following table shows the market shares for each supplier within the medium and large I&C sector (i.e. I&Cs with consumption over 73,200 kWh per annum) in the Ten Towns area at the end of Q3 2020. The corresponding graph shows the change in market shares by supplier within the same sector over the last eighteen months.

Table 20 Medium and large I&C[23] market shares by connections

End of Q3 2020

Supplier	I&C 73,200 to 732,000 kWh		I&C 732,001 to 2,196,000 kWh		I&C > 2,196,000 kWh		Total for Medium and Large I&C	
SSE Airtricity	189	18.2%	42	26.3%	23	26.1%	**254**	**19.8%**
firmus energy	502	48.4%	80	50.0%	41	46.6%	**623**	**48.5%**
Naturgy	0	0.0%	0	0.0%	1	1.1%	**1**	**0.1%**
Go Power	116	11.2%	24	15.0%	14	15.9%	**154**	**12.0%**
Flogas	230	22.2%	14	8.8%	2	2.3%	**246**	**19.1%**
Electric Ireland	0	0.0%	0	0.0%	7	8.0%	**7**	**0.5%**
Total	**1,037**	**100%**	**160**	**100%**	**88**	**100%**	**1,285**	**100%**

Source: feDL



Competing suppliers are more active in the medium and large I&C market than the small I&C market in the Ten Towns area.

Overall in the medium and large sector market shares of SSE Airtricity, Flogas and Go Power were 19.8%, 19.1% and 12.0% respectively at the end of September 2020. The market share of firmus energy, the incumbent supplier, stands at 48.5%. This is a decrease from 54.6% when compared to the same period in 2019.

[23] The medium and large I&C sector relates to any customers with annual consumption that is greater than or equal to 73,200 kWh per annum.

Gas shares by consumption (MWh[24])

This section provides information on the consumption, by supplier, in the Ten Towns area. The market shares in terms of consumption are for the period from July to September 2020.

Table 21 Domestic and small I&C[25] market shares by consumption

Q3 2020

Supplier	Total for Domestic and Small I&C Sector (MWh)	% share
SSE Airtricity	318	0.6%
firmus energy	54,465	97.3%
Go Power	377	0.7%
Flogas	828	1.5%
	-	
Total	**55,988**	**100%**

Source: feDL

As firmus energy is the only supplier in the domestic market they hold the large majority of the market share by consumption in the domestic and small I&C sector.

The other competing suppliers in the small I&C section of this market (SSE Airtricity, Go Power and Flogas) have been active since Q3 2015. During Q3 2020 their combined market share in terms of consumption in the domestic and small I&C market was 2.7%, down from 2.9% when compared to the same quarter last year.

[24] Gas consumption is presented in this QTR in MWh. It is important to note that gas consumption was presented in Therms in the QTRs for 2015 and previous years.
[25] The domestic and small I&C sector relates to any customers using less than 73,200 kWh per annum.

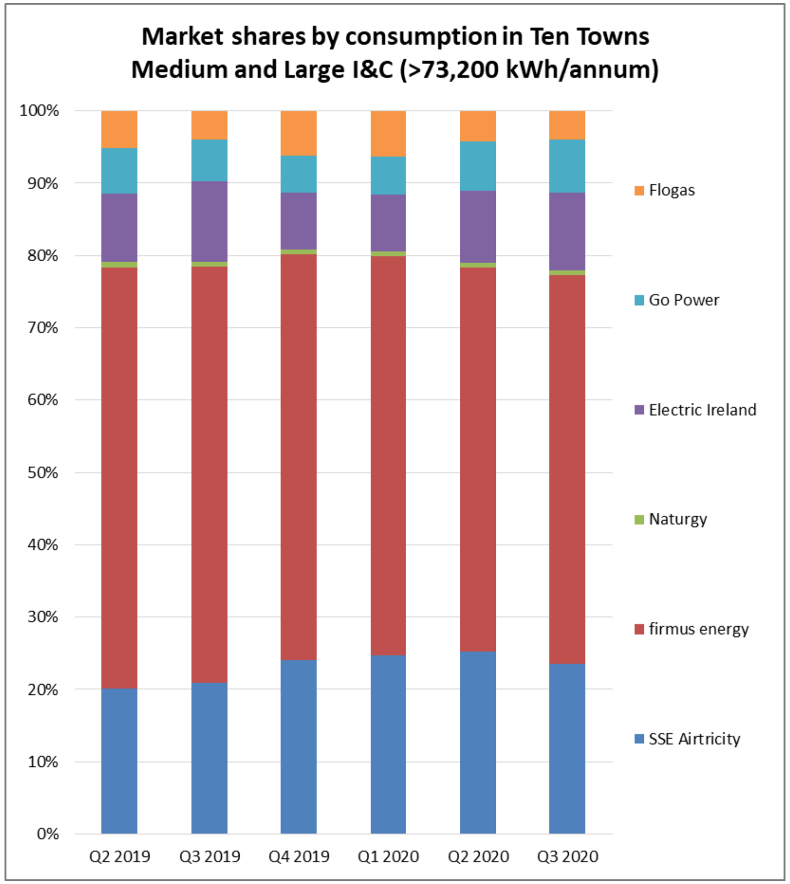
The table below shows the market shares for each supplier within the medium and large I&C sector (I&Cs using more than 73,200 kWh per annum) in the Ten Towns area during Q3 2020.

Table 22 Medium and large I&C[26] market shares by consumption

Q3 2020

Supplier	I&C 73,200 to 732,000 kWh (MWh)	% share	I&C 732,001 to 2,196,000 kWh (MWh)	% share	I&C > 2,196,000 kWh (MWh)	% share	Total for Medium and Large I&C (MWh)	% share
SSE Airtricity	8,553	21.7%	8,359	35.2%	45,537	22.6%	**62,449**	**23.6%**
firmus energy	19,295	49.0%	9,933	41.8%	113,124	56.0%	**142,352**	**53.7%**
Naturgy	-	0.0%	-	0.0%	1,645	0.8%	**1,645**	**0.6%**
Go Power	4,462	11.3%	3,158	13.3%	11,734	5.8%	**19,354**	**7.3%**
Flogas	7,111	18.0%	2,326	9.8%	1,200	0.6%	**10,637**	**4.0%**
Electric Ireland	-	0.0%	-	0.0%	28,659	14.2%	**28,659**	**10.8%**
Total	**39,421**	**100%**	**23,776**	**100%**	**201,899**	**100%**	**265,096**	**100%**

Source: feDL

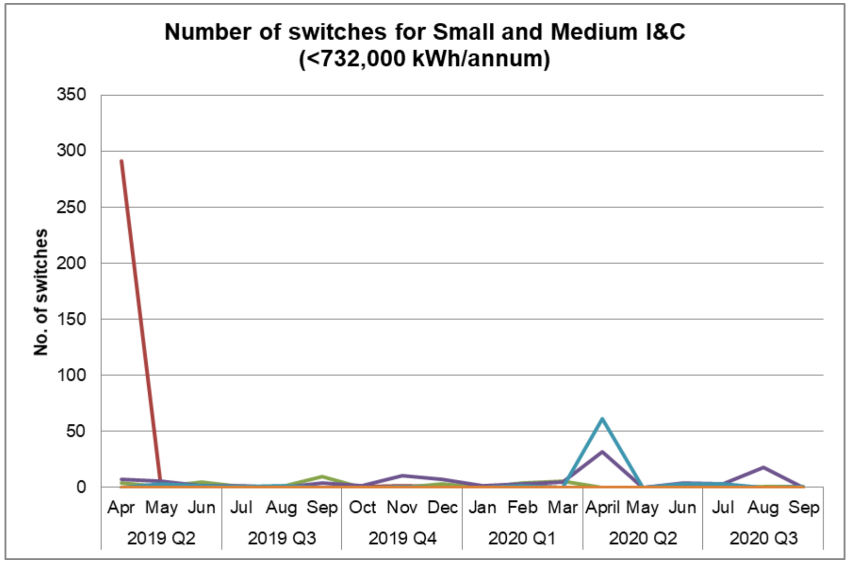


In terms of market share by consumption, firmus energy retains the largest share of the medium and large I&C sector. At the end of Q3 2020, firmus energy has 53.7% share of this market sector, which is an increase from 53.1% in Q2 2020.

[26] The medium and large I&C sector relates to any customers with annual consumption that is greater than or equal to 73,200 kWh per annum.

5.3 Market activity in the Ten Towns area

The line graphs below reflect the number of switching gains in the I&C market sector in the Ten Towns area. The switching gains are displayed by supplier; however the supplier names have been anonymised. There is no information provided on domestic switching in the Ten Towns area as there are no competing suppliers in the domestic market.



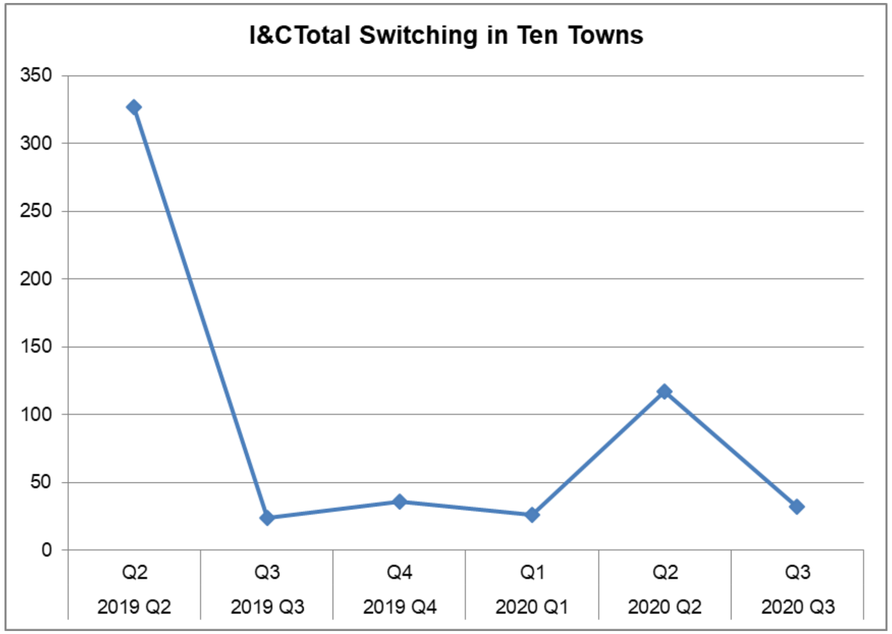
The table below shows market activity through the number of switches on a quarterly basis in the Ten Towns gas market and the associated percentage switching rate. The switching rate percentages are calculated using the number of quarterly switches divided by the number of customers at the end of the quarter in the relevant market.

Table 23 I&C activity in the Ten Towns area

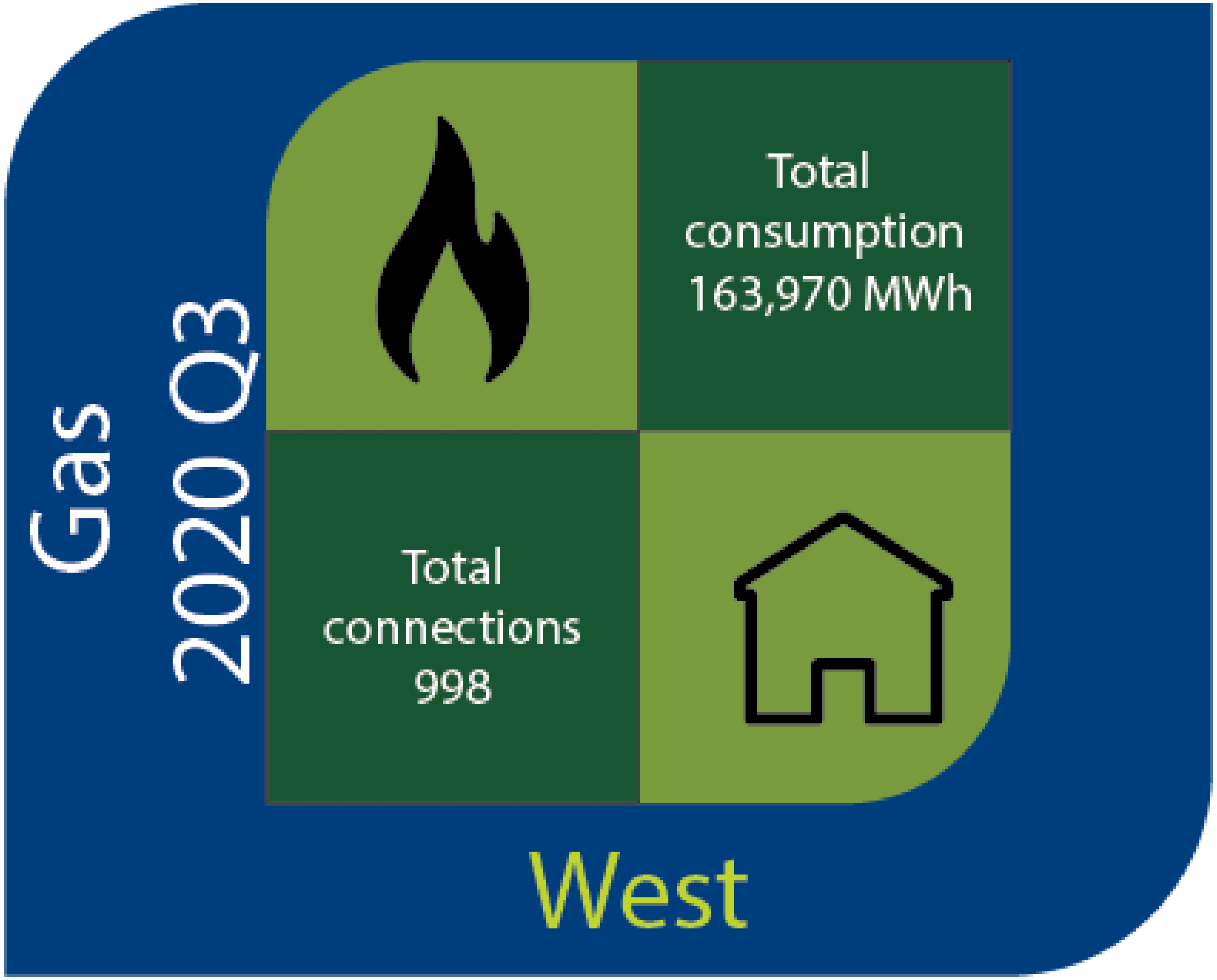
2019 Q2	327	12.1%
2019 Q3	24	0.9%
2019 Q4	36	1.3%
2020 Q1	26	0.9%
2020 Q2	117	4.2%
2020 Q3	32	1.1%

Source: feDL

The overall level of switching has been consistently low in the Ten Towns and following an increase in I&C switches during Q2 2020, the level of switching has returned to normal levels in the current quarter.



6 Gas in the West Area (SGN NG)



6.1 Connections and consumption in the West area

The table below shows gas connection numbers in the West area at the end of September 2020 and the consumption in this area during July to September 2020.

Table 24 Gas connections and consumption per market segment in the West area

Q3 2020

Market segment	Number of connections	% share of connections in sector	Consumption (MWh)[27]	% share of consumption in sector
Domestic prepayment	700	72.2%	1,265	72.1%
Domestic credit	257	26.5%	490	27.9%
I&C < 73,200 kWh	13	1.3%		
Total Domestic and Small I&C[28]	**970**	**100%**	**1,755**	**100%**
I&C 73,200 to 732,000 kWh	9	32.1%	329	0.2%
I&C 732,001 to 2,196,000 kWh	4	14.3%	666	0.4%
I&C > 2,196,000 kWh	15	53.6%	161,039	99.4%
Medium & Large I&C[29]	**28**	**100%**	**162,035**	**100%**
Total	**998**		**163,790**	

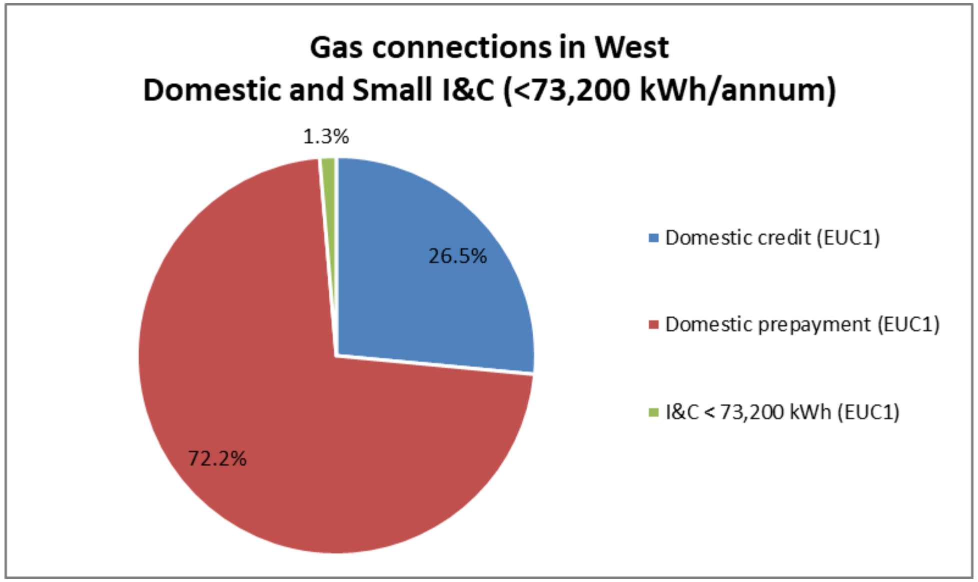
Source: SGN NG

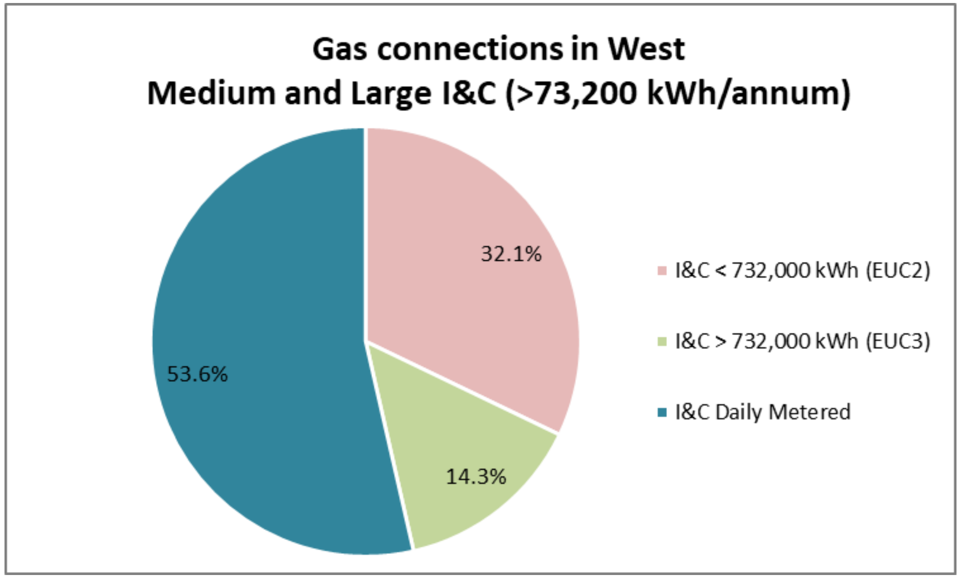
At the end of September 2020, the domestic and small I&C connections represent 97.2% of the total connections and 1.1% of consumption. The remaining 2.8% are medium and large I&C connections and represent 98.9% of total consumption in this area. Within the domestic sector, 73.1% use prepayment meters and 26.9% use credit meters to pay for their gas.

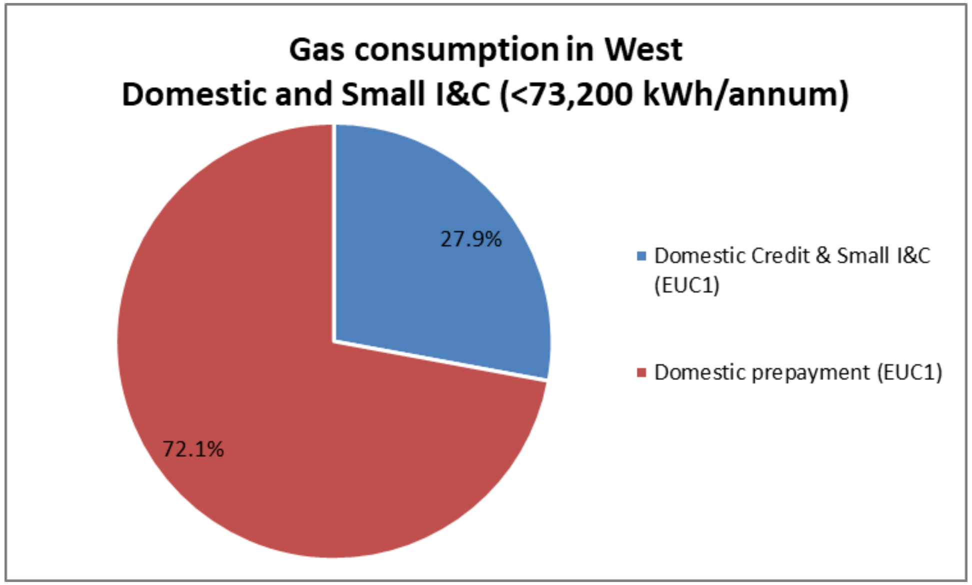
There are now 5 active suppliers in the West area, namely SSE Airtricity Gas NI (as the commissioning domestic supplier), with Electric Ireland, firmus energy, Flogas and Go Power active in the I&C market.

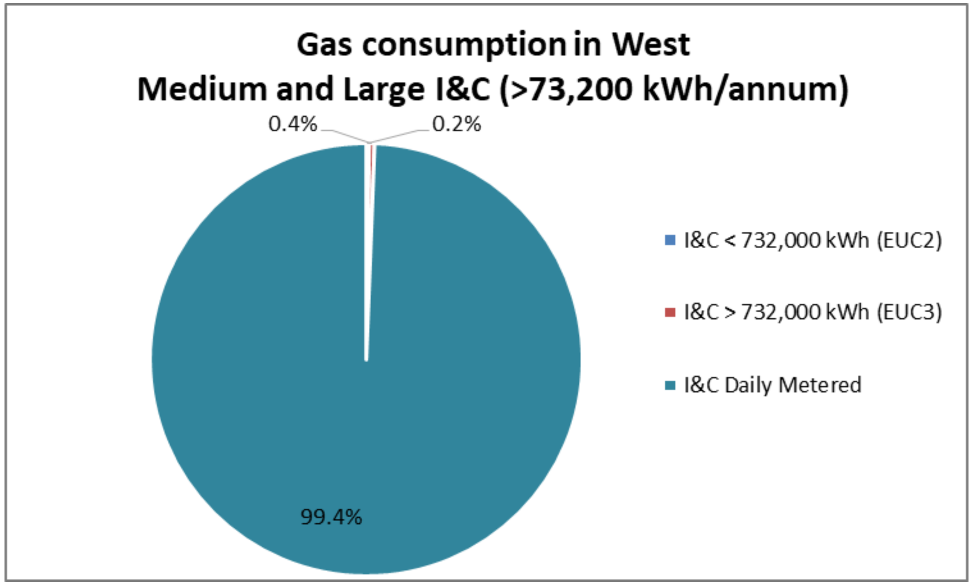
[28] The domestic and small I&C sector relates to any customers using less than 73,200 kWh per annum. The consumption information for domestic credit and small I&C are combined as this information is not available to us with a full split.

[29] The medium and large I&C sector relates to any customers with annual consumption that is greater than or equal to 73,200 kWh per annum.


Gas connections in West
Domestic and Small I&C (<73,200 kWh/annum)
1.3%
26.5%
72.2%
Domestic credit (EUC1)
Domestic prepayment (EUC1)
I&C < 73,200 kWh (EUC1)


Gas connections in West
Medium and Large I&C (>73,200 kWh/annum)
32.1%
53.6%
14.3%
I&C < 732,000 kWh (EUC2)
I&C > 732,000 kWh (EUC3)
I&C Daily Metered


Gas consumption in West
Domestic and Small I&C (<73,200 kWh/annum)
27.9%
72.1%
Domestic Credit & Small I&C (EUC1)
Domestic prepayment (EUC1)

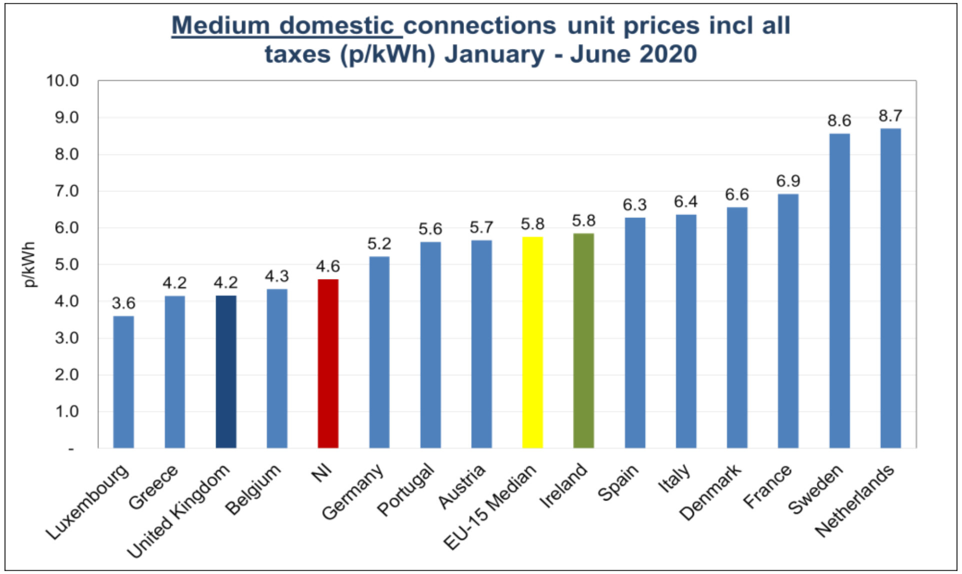

Gas consumption in West
Medium and Large I&C (>73,200 kWh/annum)
0.4%
0.2%
99.4%
I&C < 732,000 kWh (EUC2)
I&C > 732,000 kWh (EUC3)
I&C Daily Metered

7 Gas prices

7.1 Comparison against EU prices

The gas prices section, also follows the Eurostat format and methodology (as outlined in section 3.4 electricity prices). As a result the average prices for NI are comparable with prices in other EU countries (those published in BEIS's Quarterly Energy Prices reports[30] and Eurostat data base[31]) once these figures have been converted to GBP.

The pricing data detailed in this QTR is for the semester January – June 2020 (S1). In the domestic graph show below, we use unit prices which include Climate Change Levy (CCL) and include VAT, as this reflects the final prices paid by domestic customers. The medium sized domestic customers (annual consumption between 5,557 - 55,557 kWh) have been selected for the purpose of analysis, as this consumption category reflects the majority of domestic customers in NI.



Source: Eurostat and NI gas suppliers collated by UR

The NI unit price is the average pence per kWh for medium customers for the Greater Belfast, Ten Towns and West network areas. The NI domestic gas prices are slightly higher than the rest of the UK but still rank among the lowest in the EU. The NI gas prices is less than RoI and the EU median. It should be noted that the vast majority of NI domestic gas connections are customers of the relevant network incumbent suppliers and are therefore subject to their regulated tariffs.

[30] https://www.gov.uk/government/collections/quarterly-energy-prices
[31] http://ec.europa.eu/eurostat/web/energy/data/database

During the period illustrated in the graph (Semester 1: January to June 2020), there was a decrease to both the regulated tariffs within Greater Belfast & Ten Towns. Further detail on these regulated tariffs are available in the UR tariff review briefing notes[32]. The table below illustrates the regulated tariffs for S1 2020 period.

Table 25 Regulated Gas Supply Tariffs

01 October to 31 March	Greater Belfast SSE Airtricity	Ten Towns firmus energy
Domestic Regulated Tariff Usage for first 2,000 kWh	6.508 p/kWh	7.300 p/kWh
Domestic Regulated Tariff Usage >2,000 kWh	4.459 p/kWh	4.920 p/kWh
Following Regulated Tariff Reviews:		
01 April to Present	**Greater Belfast & West SSE Airtricity**	**Ten Towns firmus energy**
Domestic Regulated Tariff Usage for first 2,000 kWh	5.291 p/kWh	5.760p/kWh
Domestic Regulated Tariff Usage >2,000 kWh	3.626 p/kWh	3.880 p/kWh

[32] Firmus energy (Supply) Ltd April 2020 UR tariff review for the Ten Towns is available here. Latest SSE Airtricity Gas Supply (NI) Ltd UR tariff review for Greater Belfast & West April 2020 is available here.

Glossary

CCL	The Climate Change Levy (CCL) is a tax on electricity, gas and solid fuels delivered to I&C consumers. Its objective is to encourage businesses to reduce their energy consumption or use energy from renewable sources. The rate changes every year.
CoS	Change of supplier
EU	European Union
Eurostat	Statistical office of the EU. Its task is to provide the EU with statistics at European level that enable comparisons between countries and regions
feDL	firmus energy (Distribution) Limited
firmus energy	firmus energy (Supply) Limited
GB	Great Britain
GBP	Great British Pound
I&C	Industrial and Commercial
kWh	Kilowatt hour. Unit of energy equivalent to one kilowatt (1kW) of power expended for one hour (1h) of time. 1,000kWh = 1MWh. 1,000MWh = 1GWh.
NI	Northern Ireland
NIEN	Northern Ireland Electricity Networks
LEU	Large Energy Users
Ofgem	Office of the Gas and Electricity Markets
PNGL	Phoenix Natural Gas Limited
Q	Quarter. In this report, Q refers to the calendar year (i.e. Q1 refers to the quarter January-March).
QTRs	Quarterly Transparency Reports published by the UR at the end of the second month after each calendar
	quarter (at the end of Feb, May, Aug and Nov).
REMM	Retail Energy Market Monitoring
RoI	Republic of Ireland
SGN NG	SGN Natural Gas
S1	Semester 1
S2	Semester 2
UR	Utility Regulator
VAT	Value Added Tax
UK	United Kingdom

Annex A: Supplier Entry to Retail Markets

The tables below set out the dates that each supplier entered the retail market sectors.

Electricity	
Domestic	Incumbent supplier: Power NI June 2010: SSE Airtricity June 2009: firmus supply June 2011: Budget Energy October 2011: Electric Ireland October 2015: Click Energy October 2015: Open Electric December 2016: Open Electric ceased supply October 2019: Go Power
I&C	Incumbent supplier: Power NI July 1999: ESB Independent Energy (NI) t/a Electric Ireland August 1999: Energia January 2008: SSE Airtricity April 2009: firmus supply[33] July 2011: Budget Energy February 2012: VAYU (Naturgy as of 29th November 2018) April 2012: Go Power October 2015: Click Energy April 2018: 3T Power October 2019: Energia supply business transferred to PowerNI

Gas: Greater Belfast Area[34]	
Domestic	Incumbent supplier since September 1996: SSE Airtricity[35] July 2010: firmus energy
I&C	Incumbent supplier since September 1996: SSE Airtricity September 2008: firmus energy March 2009: Vayu (Naturgy as of 29th November 2018) May 2013: Electric Ireland August 2014: Go Power December 2014: Flogas

Gas: Ten Towns Area[36]	
Domestic	Incumbent supplier since 2005: firmus
I&C	Incumbent supplier since 2005: firmus January 2013: SSE Airtricity May 2015: Flogas June 2015: Go Power January 2017: Vayu (Naturgy as of 29th November 2018) April 2017: Electric Ireland

Gas: West Area[37]	
Domestic	July 2017 Designated Commissioning Supplier: SSE Airtricity
I&C	January 2017: Electric Ireland July 2017: SSE Airtricity January 2018: Flogas Q1 2019: Firmus energy Q3 2019: Go Power

[33] Note that firmus supply left the electricity market at the end of 2015.
[34] The Greater Belfast area is defined in Schedule 1 of the Phoenix Natural Gas Limited conveyance licence.
[35] Formerly Phoenix Supply Ltd (PSL).
[36] The Ten Towns area is defined in Schedule 1 of the firmus energy (Distribution) Limited conveyance licence.
[37] The West area is defined in Schedule 1 of the Scotia Gas Networks Northern Ireland Ltd (Distribution) Limited conveyance licence.