Utility Regulator
ELECTRICITY GAS WATER

RETAIL MARKET MONITORING

Quarterly Transparency Report

Quarter 1: January to March 2021

Published: 28 May 2021

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, BEIS[1] 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.

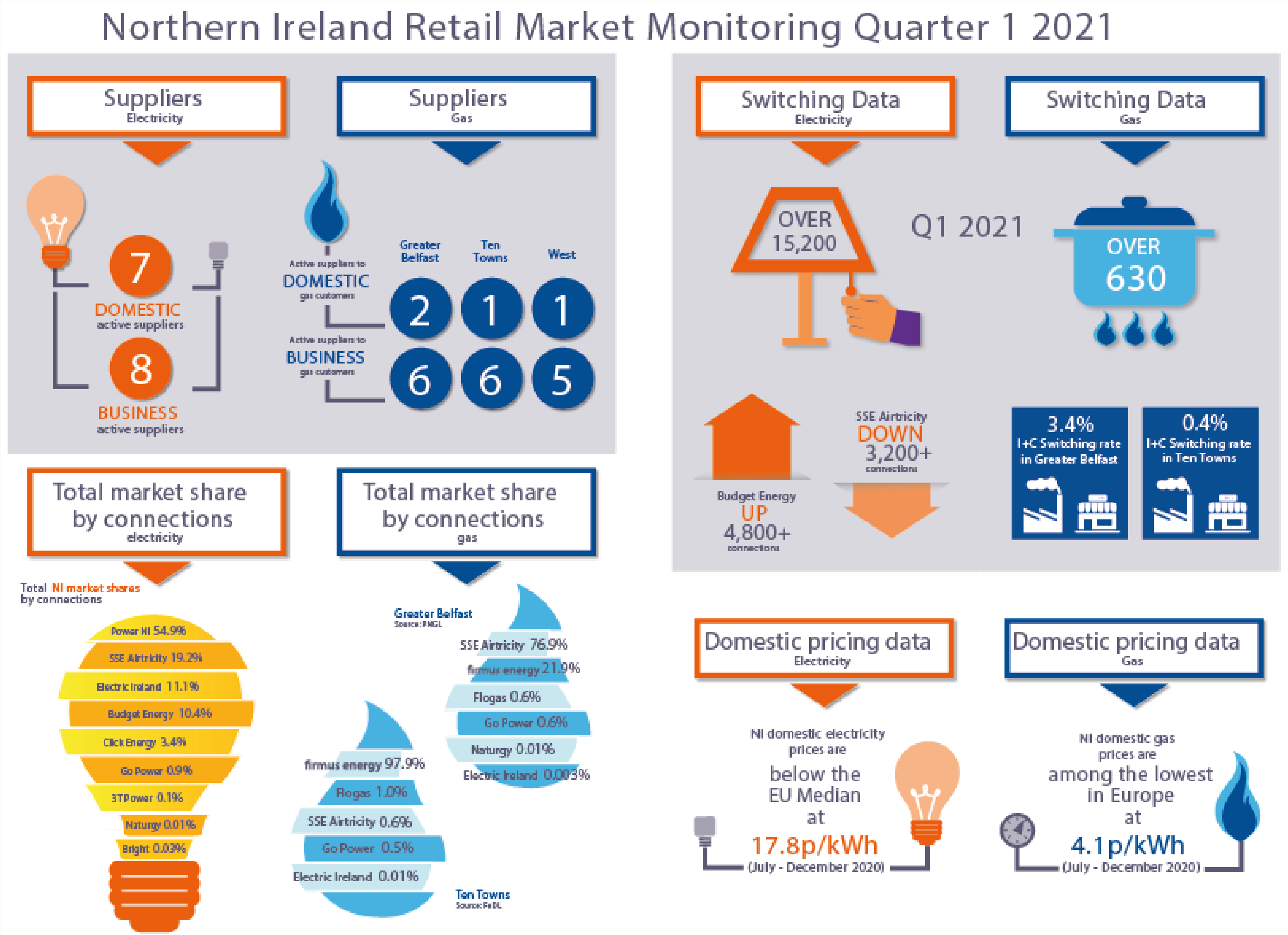
---

[1] From 01 January 2021, BEIS (Department for Business, Energy & Industrial Strategy), no longer provide pricing data to Eurostat. Therefore, the UK pricing figures reported have been obtained directly from BEIS publicised data.

Contents

1 Summary of key market indicators 2
1.1 Key developments during Quarter 1 2021 3
2 Introduction 4
2.1 Purpose, methodology and data sources 4
2.2 Energy suppliers in NI energy market 4
2.3 Electricity wholesale market monitoring data 5
2.4 Northern Ireland gas market overview 6
3 Electricity 7
3.1 NI connections and total consumption 8
3.2 Electricity Market shares 10
3.3 Electricity market activity 16
3.4 Electricity prices 17
4 Gas in the Greater Belfast area (PNGL) 20
4.1 Connections and consumption in the Greater Belfast area 21
4.2 Gas market shares in the Greater Belfast area 23
4.3 Market activity in the Greater Belfast area 27
5 Gas in the Ten Towns area (FeDL) 29
5.1 Connections and consumption in the Ten Towns area 30
5.2 Gas market shares in the Ten Towns area 32
5.3 Market activity in the Ten Towns area 36
6 Gas in the West Area (SGN NG) 37
6.1 Connections and consumption in the West area 38
7 Gas prices 40
7.1 Comparison against EU prices 40
Glossary 42
Annex A: Supplier Entry to Retail Markets 43

1 Summary of key market indicators



1.1 Key developments during Quarter 1 2021

1. The semester 2 (July to December) 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 (17.8 p/kWh) continue to rank below the EU median (19.5 p/kWh), UK (19.9 p/kWh) and are lower than the Republic of Ireland (23.7 p/kWh). • The NI I&C electricity price for the Very Small connections (which represent c72% of I&C connections) is 15.6 p/kWh, which is lower than the EU median (16.4 p/kWh), UK (17.1 p/kWh) and Republic of Ireland (21.4 p/kWh). • For Large and Very Large I&C customers (c0.02% of connections) NI prices (9.0p/kWh) are just above RoI (8.3p/kWh) but below the UK (12.2 p/kWh).
2. The domestic gas prices in NI are amongst the lowest in Europe at 4.1 p/kWh. This is less than, UK (4.3 p/kWh), RoI (6.3 p/kWh) and EU median (6.5 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 55.0% of connections in the domestic market with continued growth of the competing suppliers (representing 45.0% of domestic connections, an increase from 44.5% for the same period last year).
4. Overall electricity switching activity in Q1 2021 decreased from the previous quarters. Domestic customers continue to engage in the market with over 14,500 domestic switches completed during Q1 2021. In the I&C sector, electricity switching also saw a decrease in the period with a switching rate of 1.0% (down from 1.6% in the previous quarter), with over 770 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 0.6% in Q4 2020 to 3.4% in Q1 2021. The I&C switching rate for Ten Towns remained static with a switching rate of 0.4%.

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. Because 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[2] gas distribution area was a large I&C user during Q1 2017.

[2] 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 Q1 2021

	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		💡						
bright	💡							
Suppliers	**7**	**8**	**2**	**6**	**1**	**6**	**1**	**5**

Source: UR

During the first quarter of 2021 there were **nine** 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[3] are prepared by the Market Monitoring Unit (MMU) within the UR in joint collaboration with the Commission for Regulation of Utilities (CRU).

[3] SEM Monitoring Report covering the period 01 January – 31 March 2021.

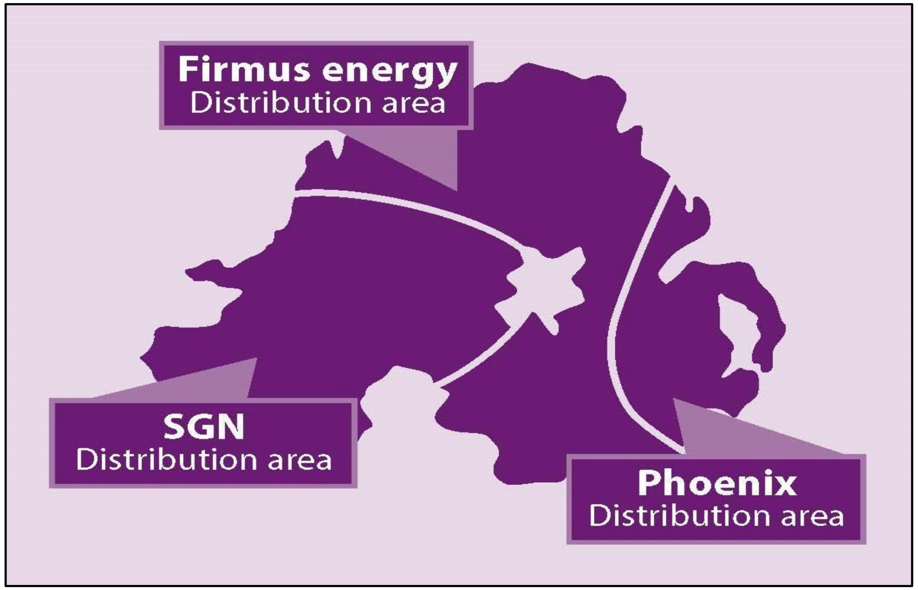
2.4 Northern Ireland gas market overview

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:

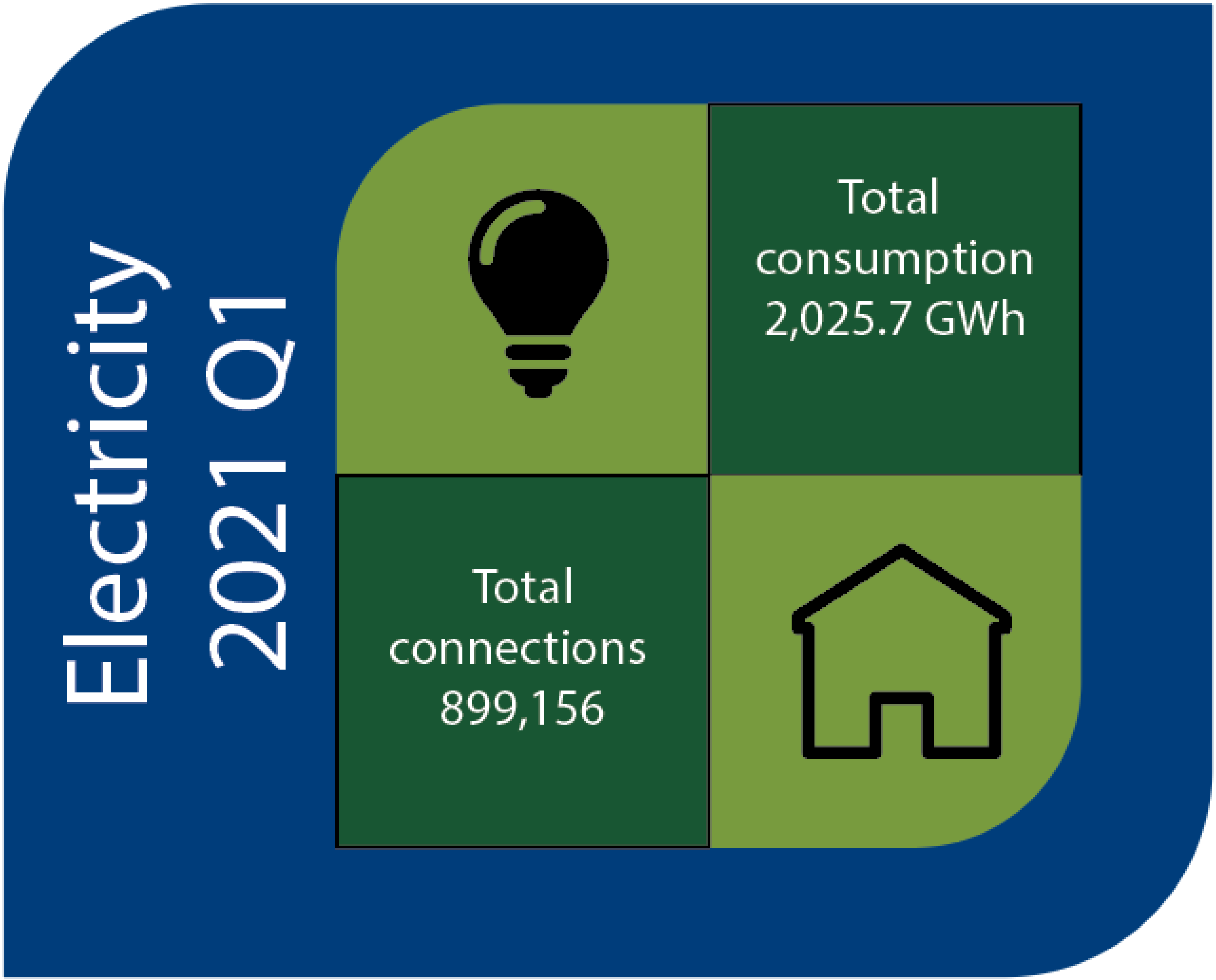
- firmus energy (Distribution) Ltd (feDL) from the North West through the Central region to the Southern areas of Northern Ireland;
- Phoenix Natural Gas Ltd (PNGL) mainly Greater Belfast, Larne and a recent extension into East Down; and
- SGN Natural Gas Ltd (SGN NG) in the West of Northern Ireland.

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[4] at end March 2021 and consumption from January to March 2021.

Table 3 Electricity connections and consumption per market segment

Q1 2021

Customer groups	Number of connections	% share of connections in market sector	Consumption (GWh)	% share of consumption in market sector
Domestic prepayment	372,166	45.1%	365.7	42.8%
Domestic credit	452,914	54.9%	489.1	57.2%
Total Domestic	**825,080**	**100%**	**854.8**	**100%**
I&C < 20 MWh	52,917	71.4%	103.3	8.8%
I&C 20 – 49 MWh	11,801	15.9%	110.2	9.4%
I&C 50 – 499 MWh	8,423	11.4%	294.8	25.2%
I&C 500 – 1,999 MWh	685	0.9%	178.8	15.3%
I&C 2,000 – 19,999 MWh	232	0.3%	315.3	26.9%
I&C ≥ 20,000 MWh	18	0.02%	168.5	14.4%
Total I&C	**74,076**	**100%**	**1,170.9**	**100%**
Total	**899,156**		**2,025.7**	

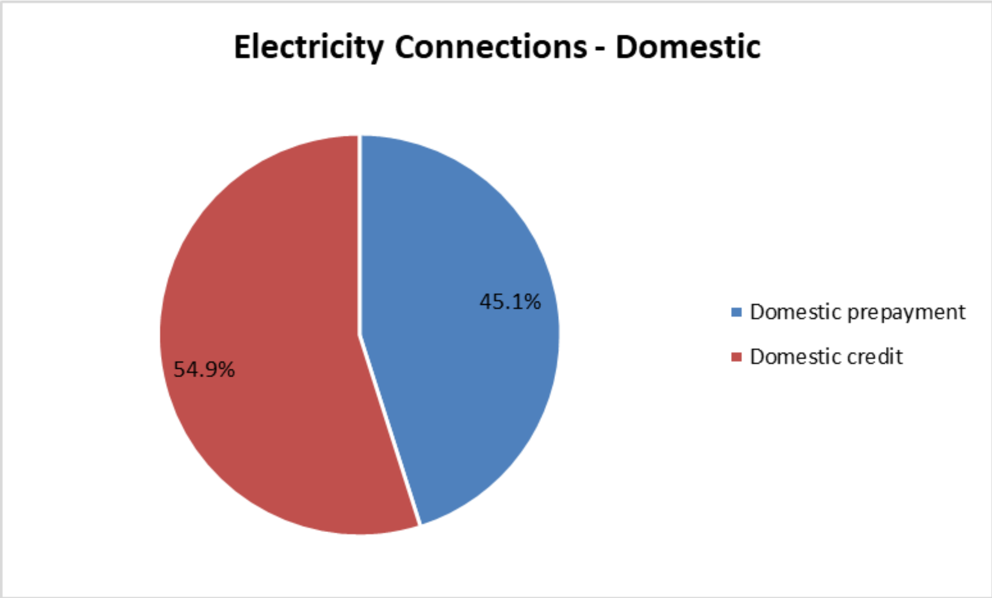
Source: NIEN

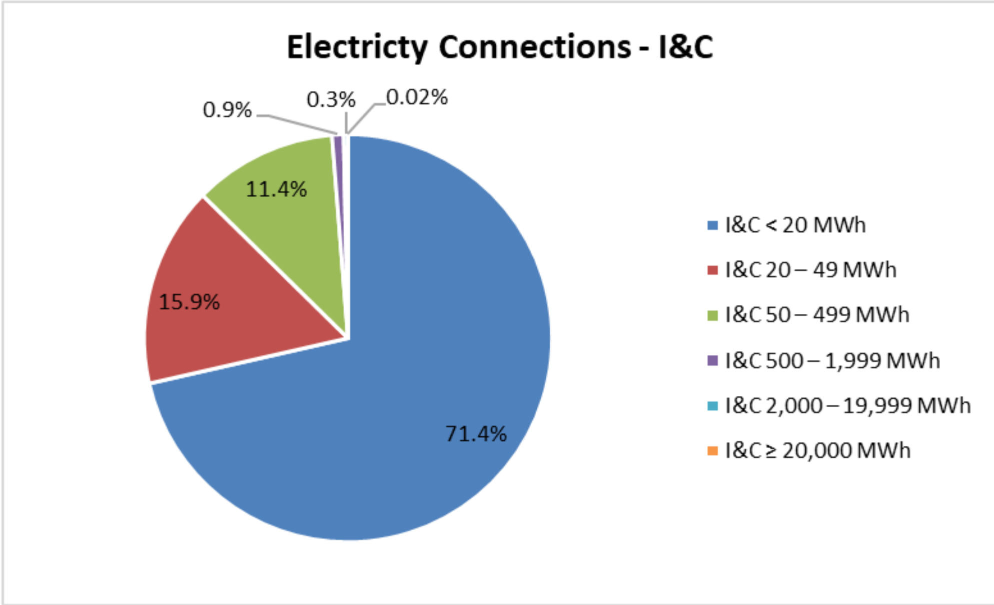
Of the total customers in Northern Ireland, 91.8% belong to the domestic sector, while the remaining 8.2% are I&C customers. In this quarter, this share translates into 42.2% and 57.8% in terms of consumption.

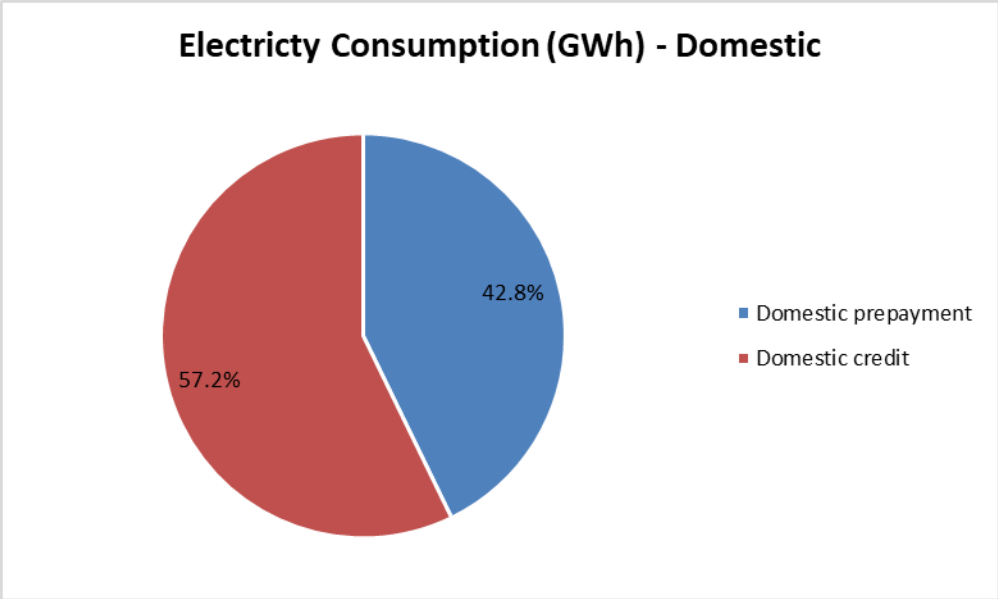
Within the domestic sector, 45.1% of the market use prepayment meters and 54.9% pay by credit (by connections).

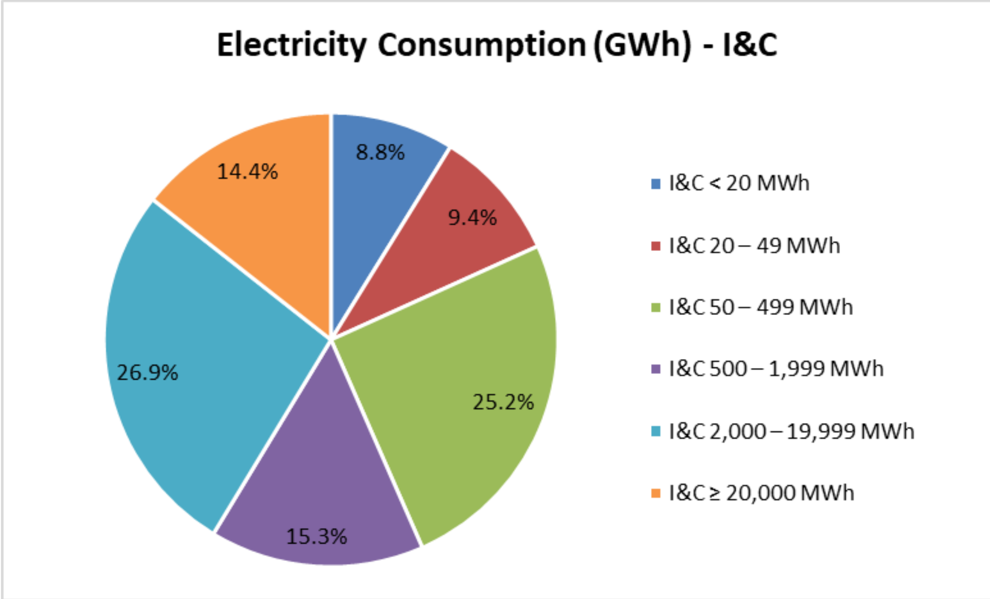
Within the I&C sector, more than 99.9% of the customers are small and medium enterprises (consuming less than 19,999 MWh), with 85.6% of the I&C consumption. The remaining are Large Energy Users (LEU) connections, that represent 8.3% of the total NI volume in this quarter, and 14.4% of the I&C consumption.

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


Electricity Connections - Domestic
45.1%
54.9%
Domestic prepayment
Domestic credit


Electricty Connections - I&C
0.9%
0.3%
0.02%
11.4%
15.9%
71.4%
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


Electricty Consumption (GWh) - Domestic
42.8%
57.2%
Domestic prepayment
Domestic credit


Electricity Consumption (GWh) - I&C
8.8%
14.4%
9.4%
26.9%
25.2%
15.3%
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[5]

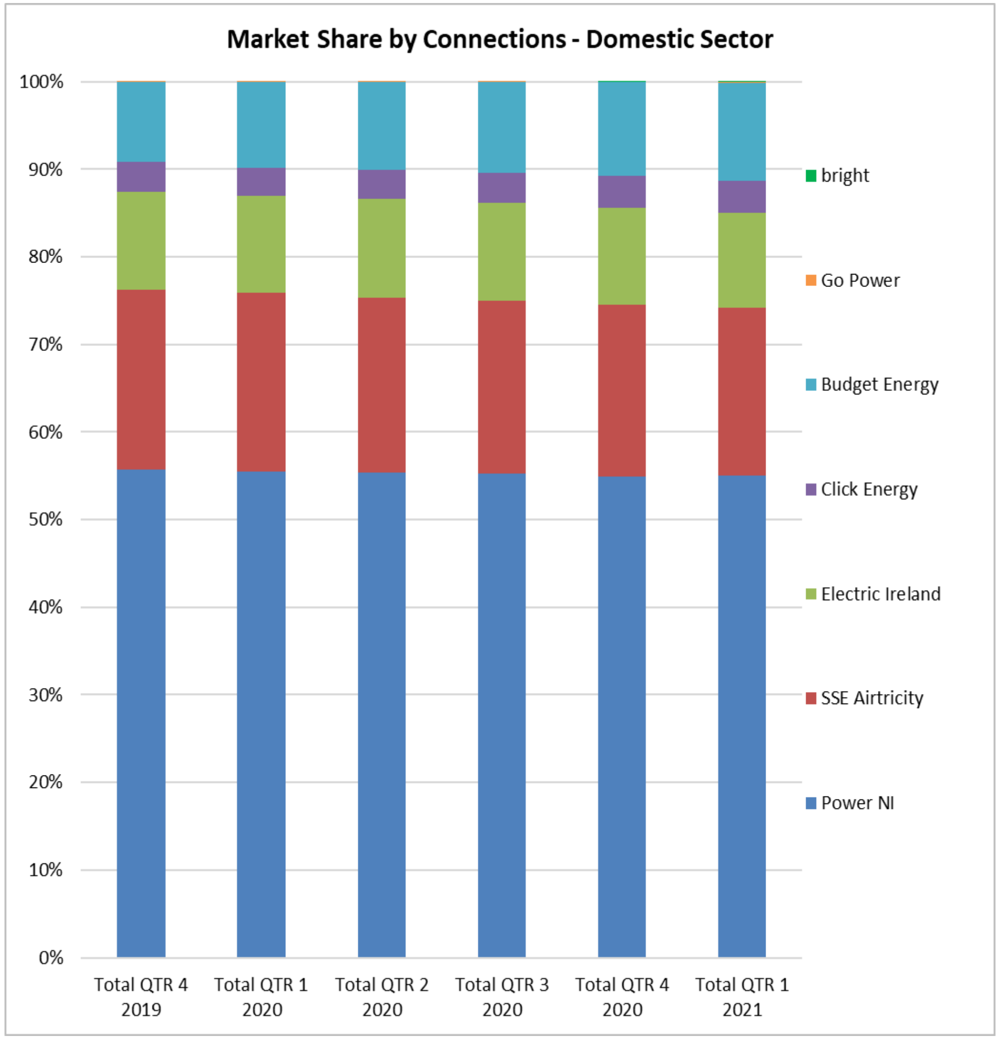
During the quarter there were seven domestic electricity suppliers in NI, and eight active suppliers in the I&C electricity market. The total number of domestic customers at the end of Q1 2021 was 825,080. As is evident from the table below a significant number of domestic customers (55.0%) remain with the previously incumbent supplier Power NI.

Table 4 Domestic market shares by connections

End of Q1 2021

Domestic Suppliers	Domestic Prepayment		Domestic Credit		Domestic Total	
Power NI	161,680	43.4%	291,925	64.5%	**453,605**	**55.0%**
SSE Airtricity	62,365	16.8%	95,983	21.2%	**158,348**	**19.2%**
Go Power	-	0%	638	0.1%	**638**	**0.1%**
Electric Ireland	40,841	11.0%	48,439	10.7%	**89,280**	**10.8%**
Budget Energy	79,746	21.4%	13,158	2.9%	**92,904**	**11.3%**
Click Energy	27,447	7.4%	2,612	0.6%	**30,059**	**3.6%**
bright	87	0.02%	159	0.04%	**246**	**0.03%**
Dom Market	**372,166**	**100%**	**452,914**	**100%**	**825,080**	**100%**

Source: NIEN



The market shares in this quarter illustrate a similar position to the previous quarter for Power NI. For Q1 2021 Power NI supplied 43.4% of the domestic prepayment and 64.5% of the domestic credit market.

The slow growth of the new entrants in the domestic market is clear, given that the non-incumbents now represent 45.0% of total domestic connections in NI (an increase from 44.5% in the same period last year).

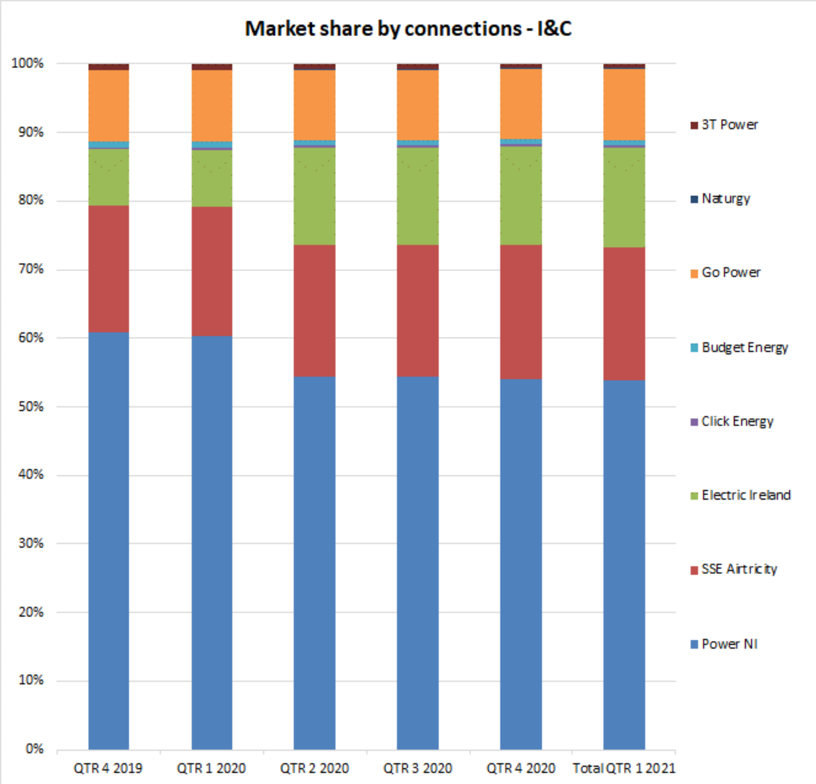
[5] Market shares figures do not include de-energised nor Long Term Vacant sites.

Table 5 I&C market shares by connections

End of Q1 2021

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	31,361	59.3%	5,037	42.7%	3,176	37.7%	221	32.3%	77	33.2%	3	16.7%	**39,875**	**53.8%**
SSE Airtricity	10,065	19.0%	2,868	24.3%	1,379	16.4%	93	13.6%	28	12.1%	5	27.8%	**14,438**	**19.5%**
Go Power	4,986	9.4%	1,473	12.5%	1,188	14.1%	74	10.8%	30	12.9%	3	16.7%	**7,754**	**10.5%**
Electric Ireland	5,726	10.8%	2,240	19.0%	2,354	27.9%	263	38.4%	89	38.4%	7	38.9%	**10,679**	**14.4%**
Budget Energy	376	0.7%	103	0.9%	51	0.6%	-	0%	-	0%	-	0%	**530**	**0.7%**
Naturgy	21	0.1%	3	0.03%	14	0.2%	16	2.2%	3	1.3%	-	0%	**57**	**0.1%**
Click Energy	241	0.5%	36	0.3%	19	0.2%	2	0.3%	2	0.9%	-	0%	**300**	**0.4%**
3T Power	141	0.3%	41	0.4%	242	2.9%	16	2.3%	3	1.3%	-	0%	**443**	**0.6%**
I&C Market	**52,917**	**100%**	**11,801**	**100%**	**8,423**	**100%**	**685**	**100%**	**232**	**100%**	**18**	**100%**	**74,076**	**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 Q1 2021, 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

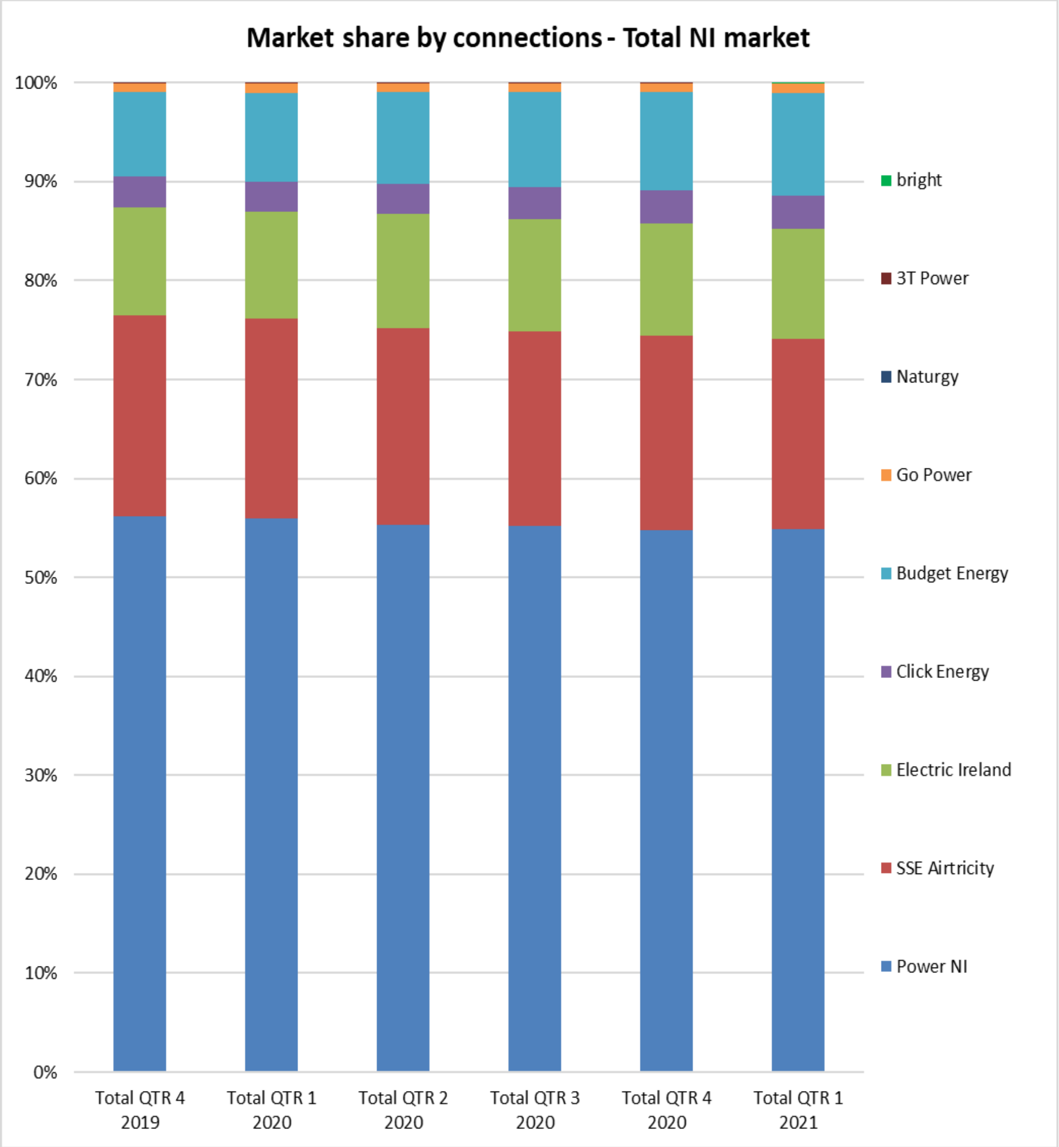
End of Q1 2021

Suppliers	Total	
Power NI	493,480	54.9%
SSE Airtricity	172,786	19.2%
Electric Ireland	99,959	11.1%
Budget Energy	93,434	10.4%
Click Energy	30,359	3.4%
Go Power	8,392	0.9%
Naturgy	57	0.01%
3T Power	443	0.1%
bright	246	0.03%
Total Market	**899,156**	**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 decreased from 54.9% when compared to 55.9% for the same period in Q1 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

Q1 2021

Domestic Suppliers	Domestic Prepayment		Domestic credit		Domestic Total	
	GWh	%	GWh	%	GWh	%
Power NI	154.8	42.3%	296.5	60.6%	**451.3**	**52.8%**
SSE Airtricity	61.3	16.8%	118.1	24.1%	**179.4**	**21.0%**
Electric Ireland	43.1	11.8%	54.1	11.1%	**97.2**	**11.4%**
Click Energy	27.5	7.5%	2.8	0.6%	**30.3**	**3.5%**
Budget Energy	79.0	21.6%	15.6	3.2%	**94.6**	**11.1%**
Go Power	-	0%	1.8	0.4%	**1.8**	**0.2%**
bright	0.04	0.01%	0.2	0.04%	**0.2**	**0.02%**
Dom Market	**365.7**	**100%**	**489.1**	**100%**	**854.8**	**100%**

Source NIEN

In Q1 2021, Power NI's share of the market by consumption was 42.3% for domestic prepayment and 60.6% for domestic credit, this is around the same level when compared to Q1 2020 when Power NI's domestic prepayment market share was 42.3% and their domestic credit market share was 61.6%.

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.

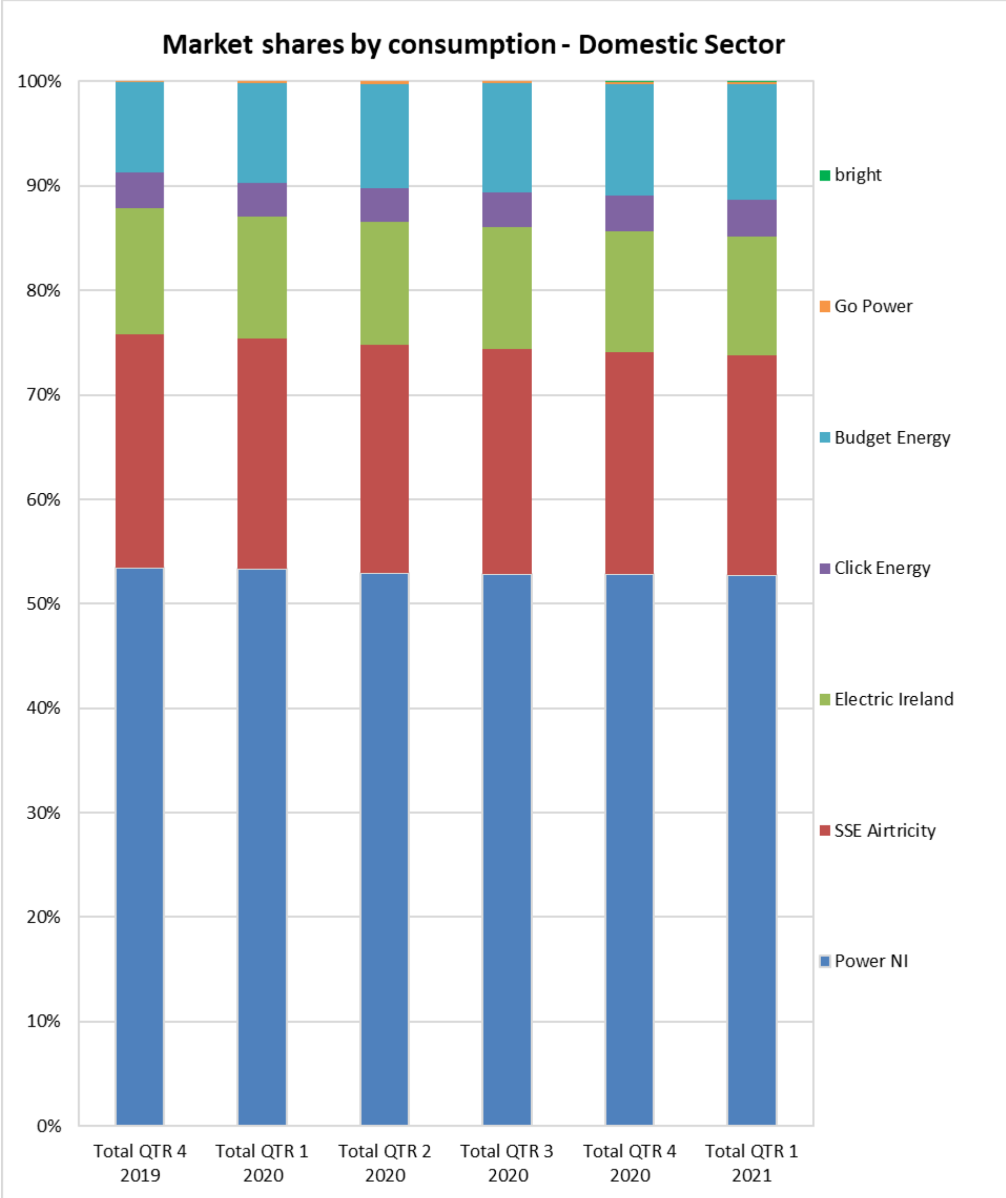


Table 8 I&C market shares by consumption

Q1 2021

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	55.5	53.7%	46.9	42.6%	105.1	35.7%	62.1	34.7%	108.7	34.5%	18.6	11.0%	**396.9**	**33.9%**
SSE Airtricity	21.7	21.0%	26.7	24.2%	46.6	15.8%	23.7	13.3%	39.3	12.5%	46.0	27.3%	**204.0**	**17.4%**
Go Power	10.9	10.6%	13.3	12.1%	38.7	13.1%	21.3	11.9%	29.7	9.4%	48.9	29.0%	**162.8**	**13.9%**
Electric Ireland	13.4	13.0%	21.3	19.3%	88.0	29.9%	64.1	35.9%	129.9	41.2%	55.0	32.6%	**371.7**	**31.7%**
Budget Energy	1.1	1.1%	1.5	1.4%	1.8	0.6%	-	0.0%	-	0.0%	-	0.0%	**4.4**	**0.4%**
Naturgy	-	0.0%	-	0.0%	0.9	0.3%	4.0	2.2%	3.1	1.0%	-	0.0%	**8.0**	**0.7%**
Click Energy	0.3	0.3%	0.2	0.2%	0.7	0.2%	0.4	0.2%	2.5	0.8%	-	0.0%	**4.1**	**0.4%**
3T Power	0.4	0.4%	0.3	0.3%	13.0	4.4%	3.2	1.8%	2.1	0.7%	-	0.0%	**19.0**	**1.6%**
Total Market	**103.3**	**100%**	**110.2**	**100%**	**294.8**	**100%**	**178.8**	**100%**	**315.3**	**100%**	**168.5**	**100%**	**1,170.9**	**100%**

Source: NIEN

The main suppliers by consumption in the I&C sector are Power NI (33.9%), Electric Ireland (31.7%), SSE Airtricity (17.4%) and Go Power (13.9%).

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.

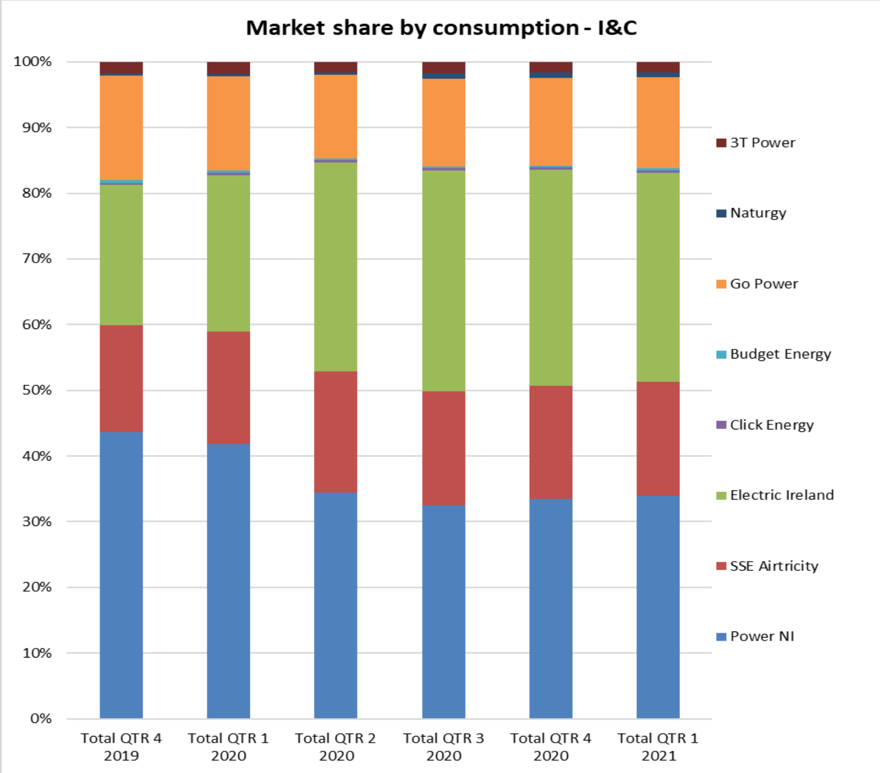
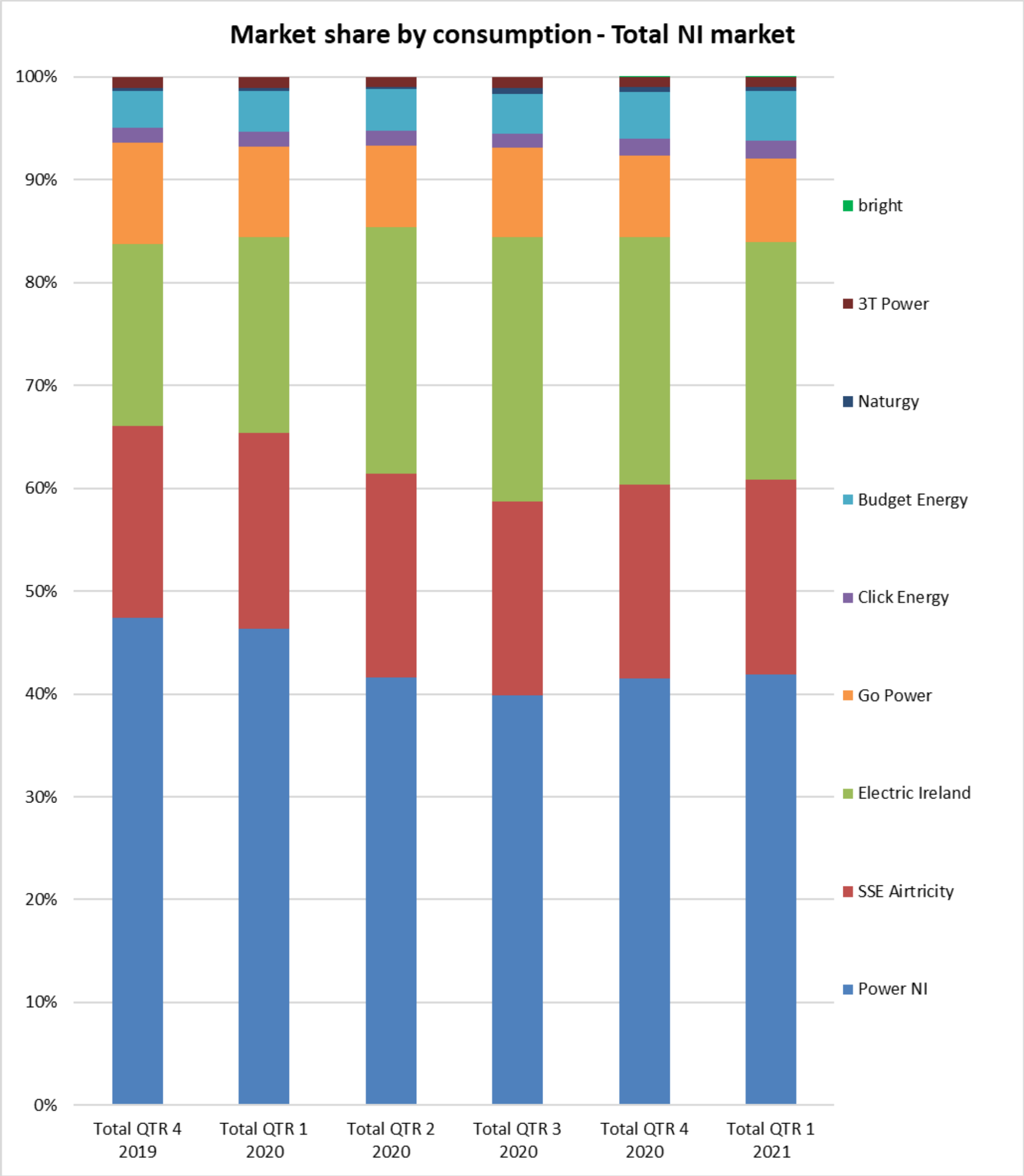


Table 9 Total NI market shares by consumption

Q1 2021

Total Market	Total	
	GWh	%
Power NI	848.2	41.9%
SSE Airtricity	383.4	18.9%
Electric Ireland	468.9	23.1%
Go Power	164.6	8.1%
Click Energy	34.4	1.7%
Budget Energy	99.0	4.9%
Naturgy	8.0	0.4%
3T Power	19.0	0.9%
bright	0.2	0.01%
Total Market	**2,025.7**	**100%**

Source: NIEN

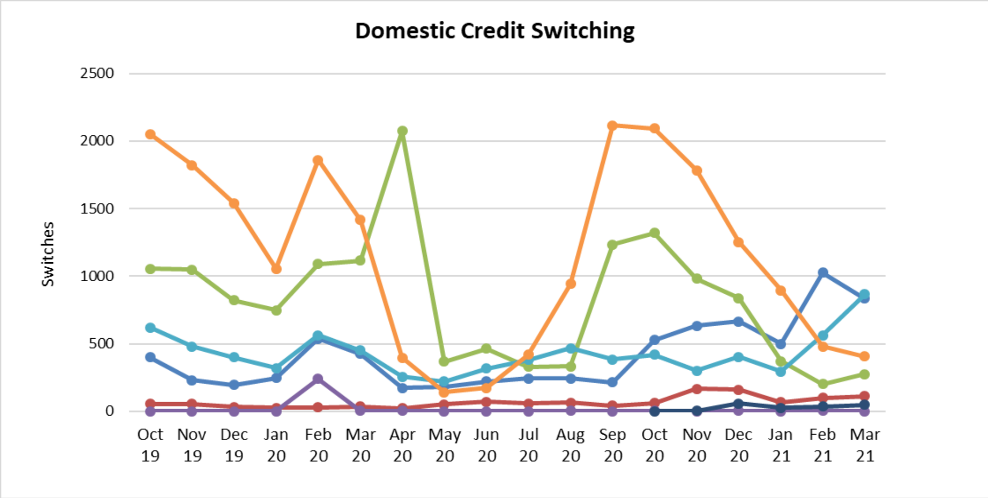


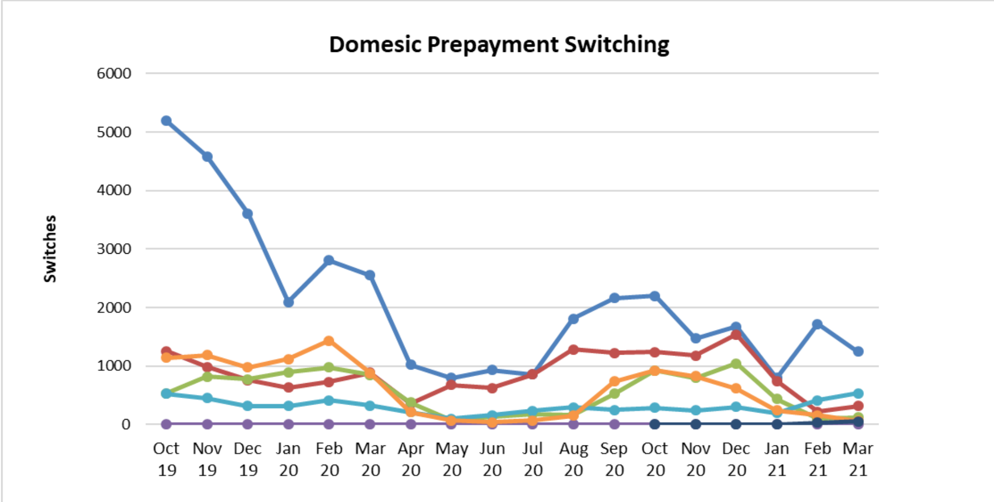
Electricity consumption in NI retail market for Q1 2021 was over 2,025 GWh, which indicates a year on year decrease when compared to 2,082 GWh consumed in Q1 2020.

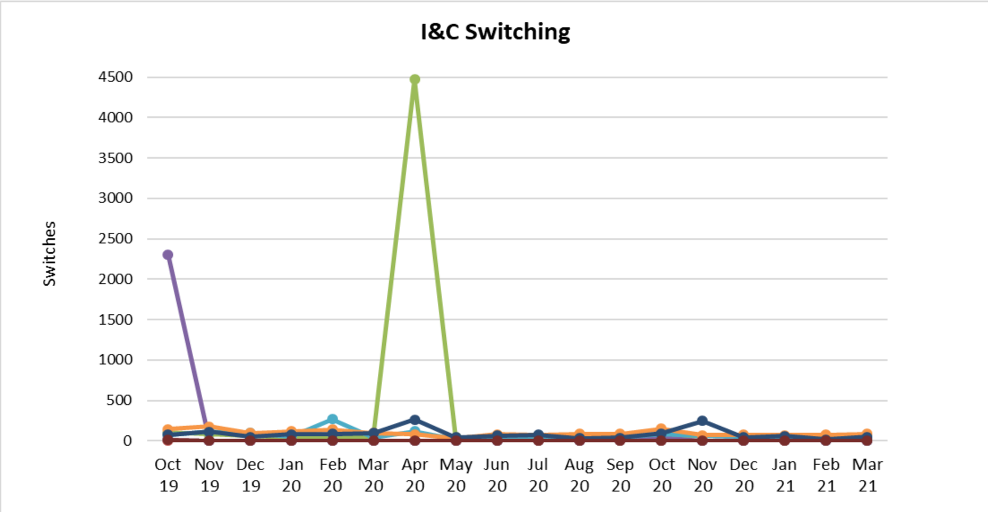
The graph to the right reflects the trends in market shares (by total consumption) for each active domestic and I&C supplier in NI for the previous six quarters.

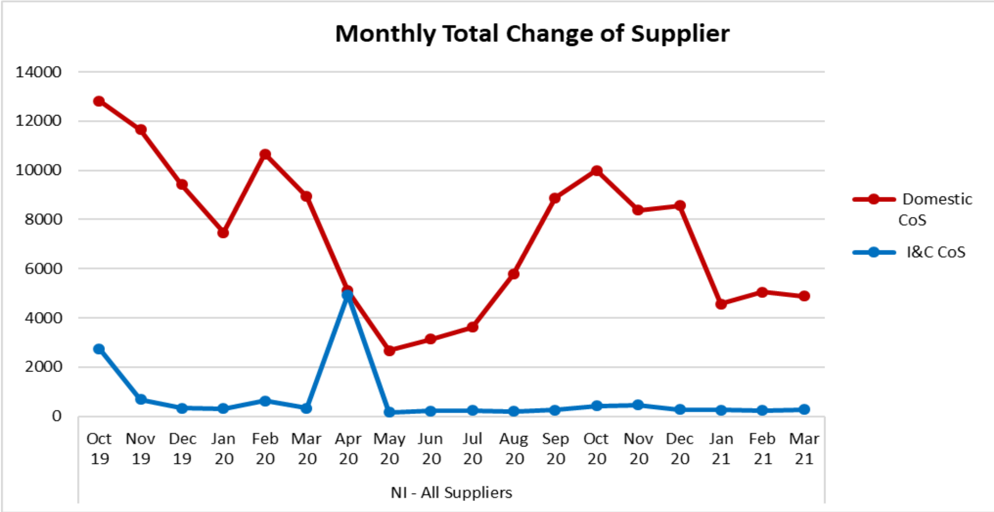
3.3 Electricity market activity

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

Q1 2021

Period	Domestic Switching		I&C Switching		Total Switching	
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%
2020 Q4	26,938	3.3%	1,167	1.6%	28,105	3.1%
2021 Q1	14,512	1.8%	772	1.0%	15,284	1.7%

Source: NIEN

The number of domestic switches over this quarter decreased from the previous quarter, with an average of c4,800 switches per month compared to c8,900 switches per month for the previous quarter.

The percentage of domestic switching for Q1 2021 decreased from 3.3% to 1.8%.The I&C market activity also saw a decrease from 1.6% in Q4 2020 to 1.0% in Q1 2021.

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 the Department for Business, Energy & Industrial Strategy's (BEIS) Quarterly Energy Prices reports[6] and Eurostat data base[7]) once these figures have been converted to GBP (Note: from 01 January 2021, BEIS no longer provide pricing data to Eurostat. Therefore, the UK figures reported in the subsequent graphs have been obtained directly from BEIS publicised data).

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 the comparable six-month period for NI.

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

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

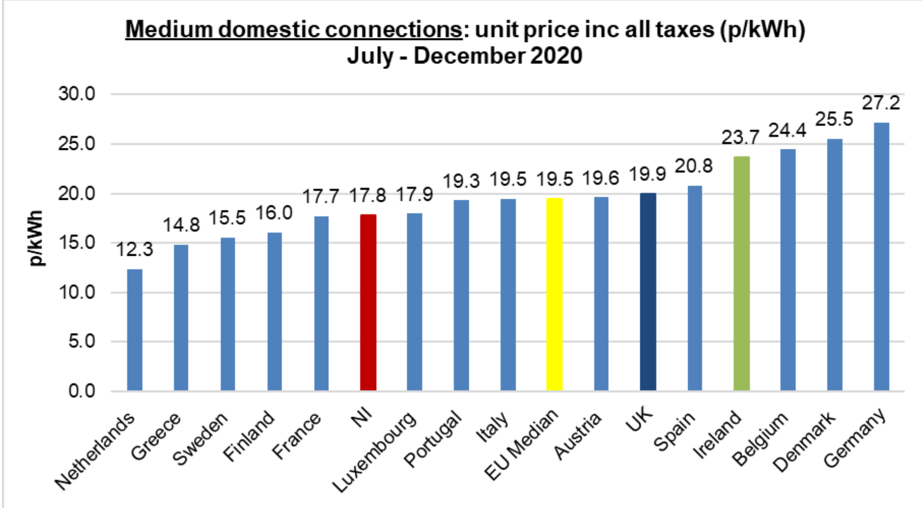
It should be noted that the comparability of the derived NI prices to the other Member States can be greatly affected by fluctuations in the Euro GBP exchange rate. For the purposes of tariff comparisons we convert the EU tariff data from Euro to GBP using the monthly average exchange rate applicable 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 2 July 2020 to December 2020.

Domestic price comparison with EU

In the domestic graph shown below, we use unit prices that 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 semester 2 2020 the NI price was below the EU median and considerably less than RoI. At the time of publication, there was no UK medium domestic figure available from BEIS and the UK figure used is for semester 1 2020. This will be updated during the next publication of the QTR (pending availability of data).



I&C price comparison with EU

The following graphs show I&C electricity prices in the 15 EU[8] 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[9] the NI prices are lower than the EU median, UK and significantly lower than RoI (c72% 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 but at below the UK.

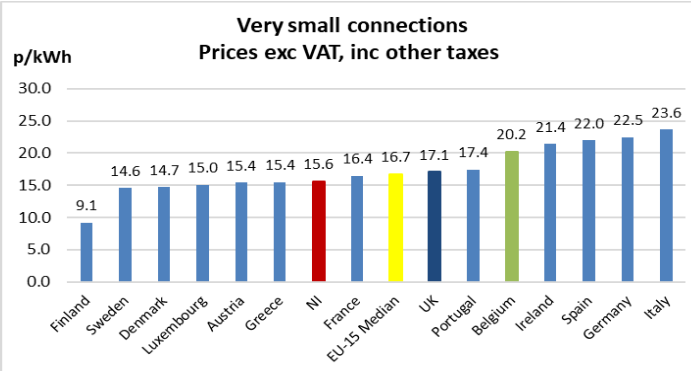
[8] Some graphs do not include all 15 EU countries due to availability of data from Eurostat.

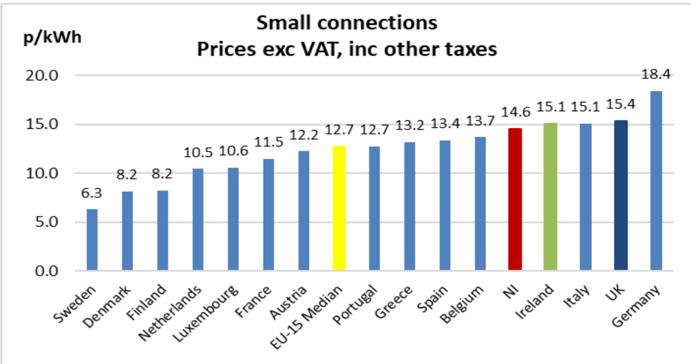
Table 11 Electricity market % by I&C consumption band

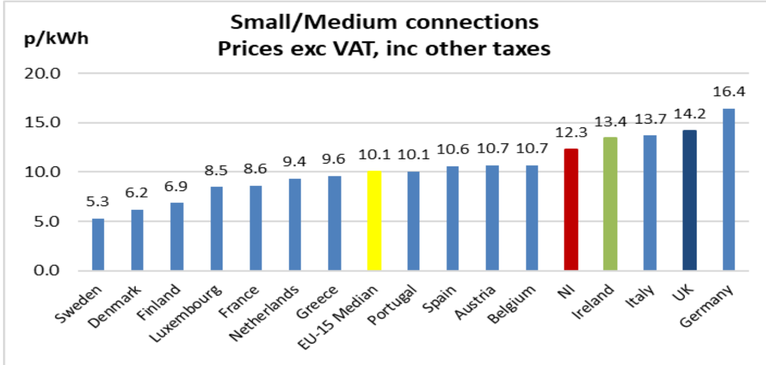
End of Q4 2020[10]

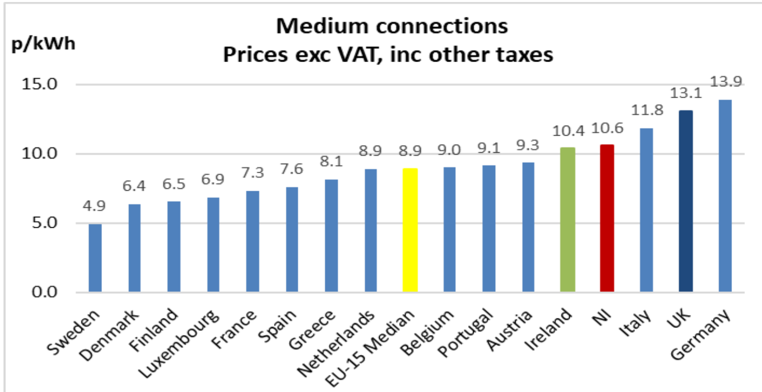
Size of customer	Annual consumption bands (MWh)	% of I&C connections	% of I&C consumption	I&C connection numbers
Very small	< 20	71.8%	8.0%	53,212
Small	20 – 499	26.9%	35.7%	19,889
Small / Medium	500 – 1,999	1.0%	15.5%	714
Medium	2,000 – 19,999	0.3%	26.8%	231
Large & Very Large	>20,000	0.02%	14.0%	16

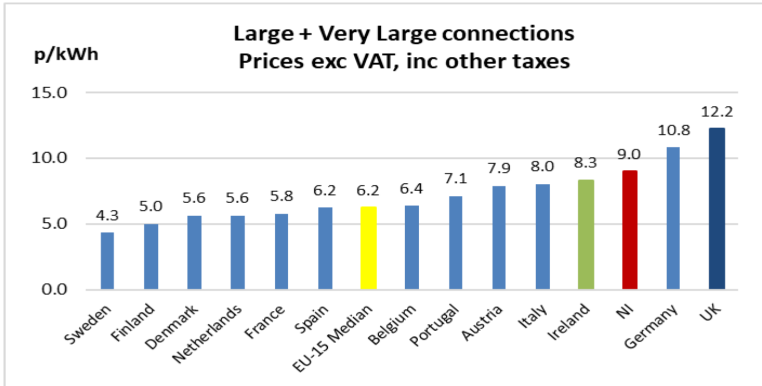
Source: NIEN







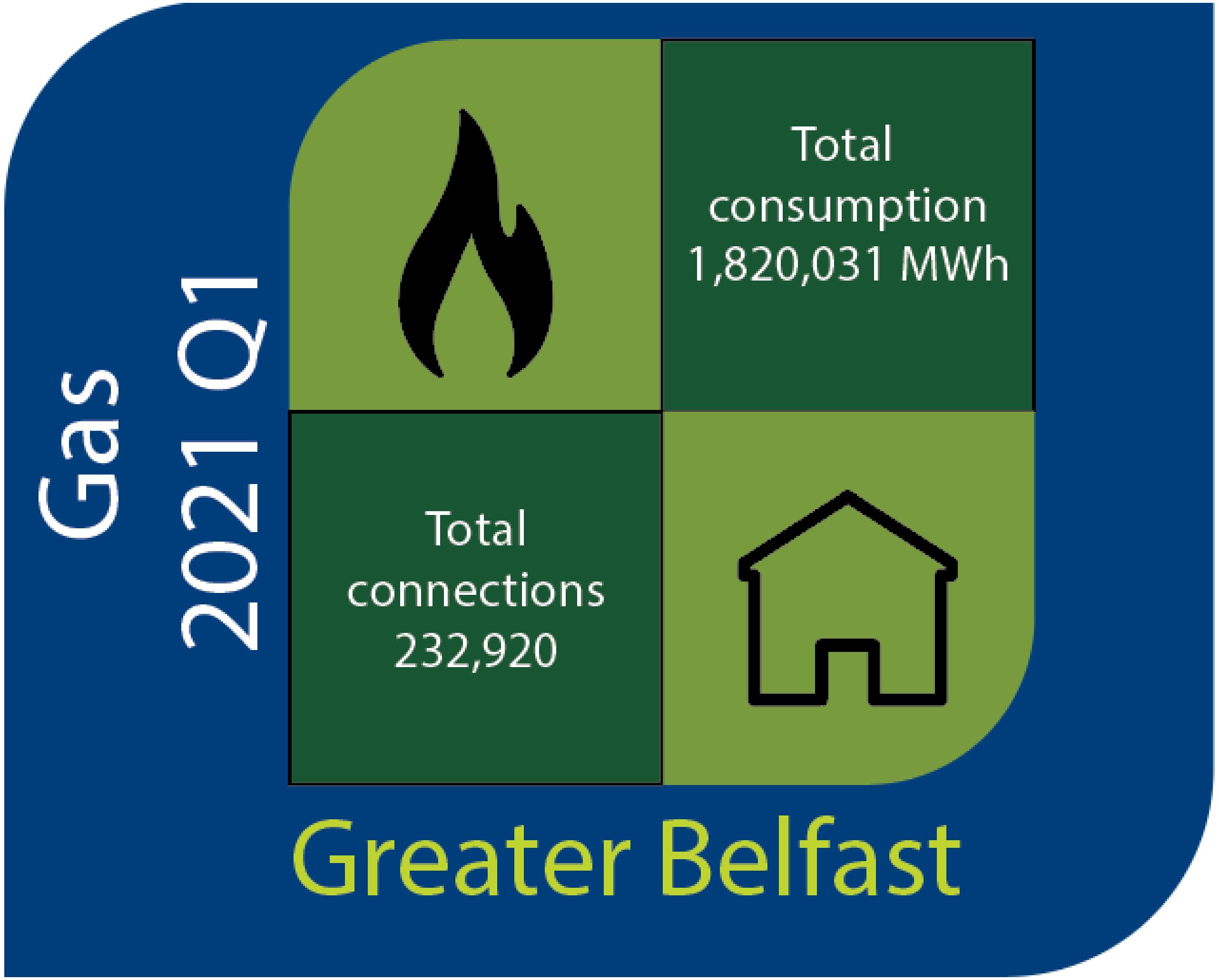




Source: NI electricity suppliers, Eurostat, BEIS and UR internal calculations

[10] The pricing data relates period end Q4 2020 (S2 July - December 2020) as opposed to Q1 2021. This is due to the availability of pricing data from Eurostat, BEIS 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 March 2021 and the consumption in this area during January to March 2021

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

Q1 2021

Market sector	Number of connections	% share of connections in sector	Consumption (MWh)[11]	% share of consumption in sector
Domestic prepayment	141,527	61.6%	568,796	49.3%
Domestic credit	79,938	34.8%	584,713	50.7%
I&C < 73,200 kWh	8,294	3.6%		
Total Domestic and Small I&C[12]	**229,759**	**100%**	**1,153,509**	**100%**
I&C 73,200 to 732,000 kWh	2,762	87.4%	219,007	32.9%
I&C 732,001 to 2,196,000 kWh	278	8.8%	126,182	18.9%
I&C > 2,196,000 kWh	121	3.8%	321,333	48.2%
Medium & Large I&C[13]	**3,161**	**100%**	**666,522**	**100%**
Total	**232,920**		**1,820,031**	

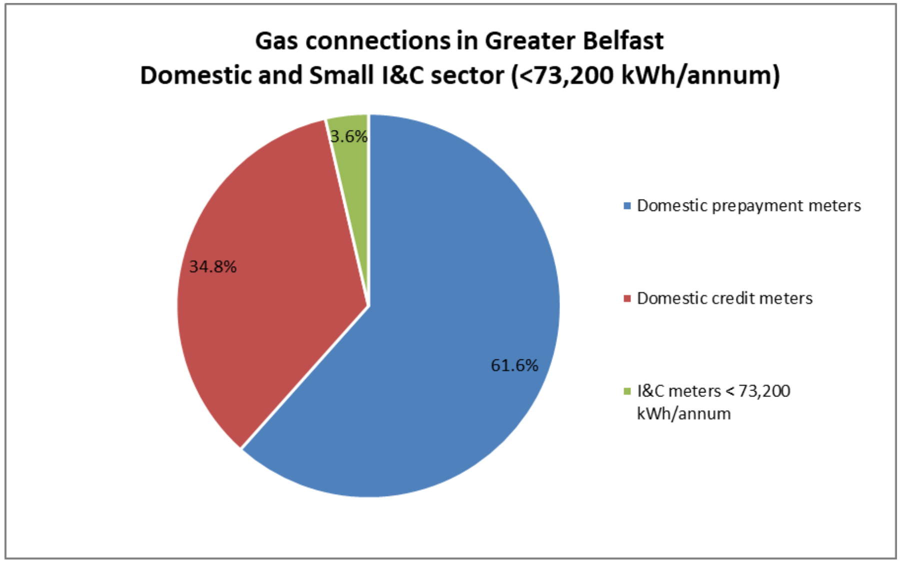
Source: PNGL

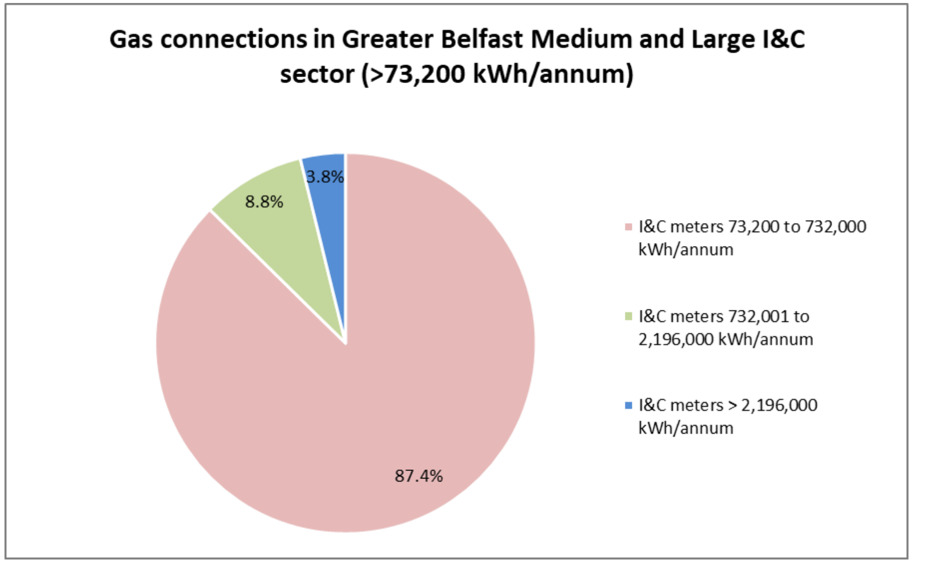
At the end of March 2021, the domestic and small I&C connections represent 98.6% of the total connections and 63.4% by consumption. The remaining 1.4% of connections are medium and large I&C which represent 36.6% of consumption.

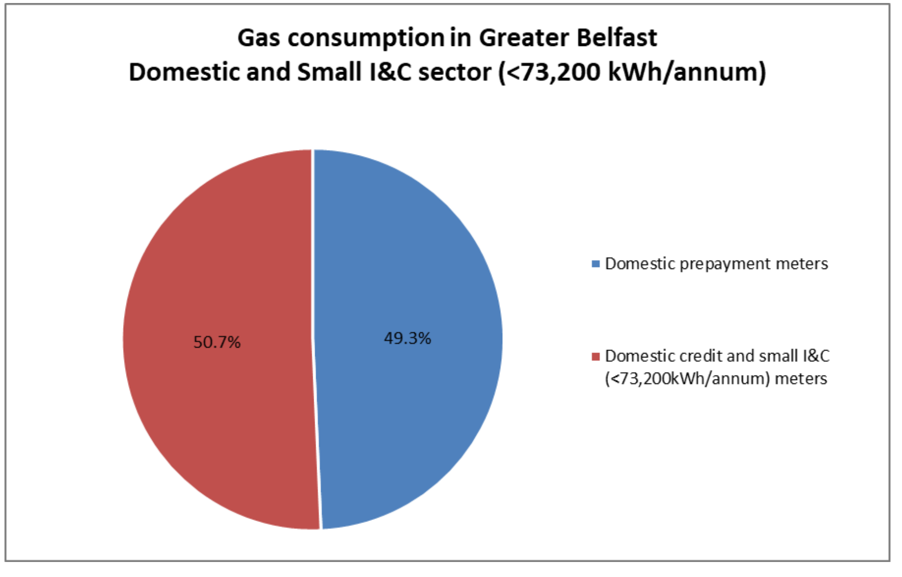
Within the domestic sector, 63.9% of the connections use prepayment meters and 36.1% use credit meters to pay for their gas.

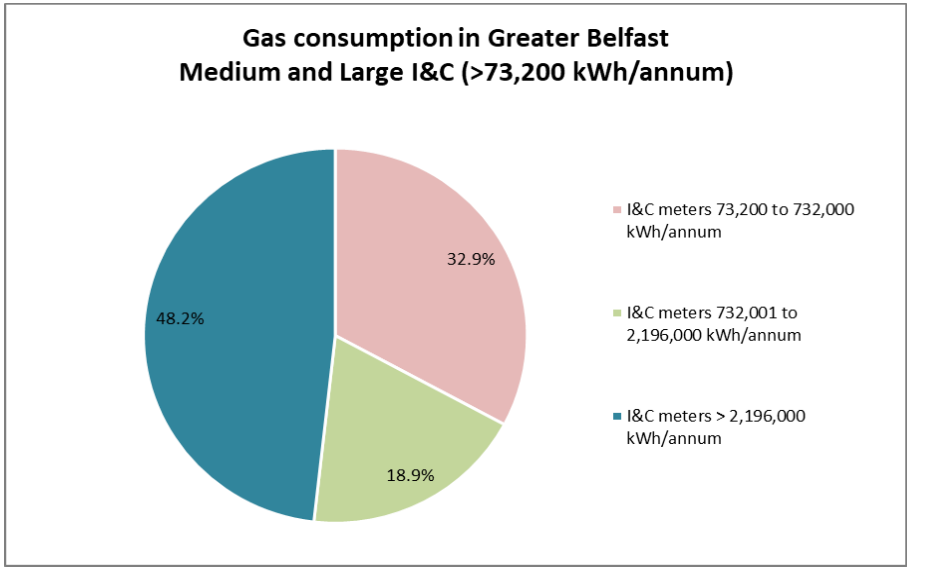
[11] Gas consumption is presented in MWh (previously up to 2015 gas consumption was presented in Therms in the QTRs.
[12] The domestic and small I&C sector relates to any customers using less than 73,200 kWh per annum. The consumption information for domestic credit and small I&C are combined as this 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 March 2021 and the consumption in this area during January to March 2021.









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 March 2021 and the market shares in terms of consumption are for the period January to March 2021. 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 as a percentage share within the sector (as at the end of March 2021).

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

End of Q1 2021

Supplier	Domestic prepayment		Domestic Credit		I&C < 73,200 kWh		Total for Domestic and Small I&C	
SSE Airtricity	106,254	75.1%	66,591	83.3%	5,284	63.7%	**178,129**	**77.5%**
firmus energy	35,273	24.9%	13,340	16.7%	1,316	15.9%	**49,929**	**21.7%**
Naturgy	-	0%	-	0%	5	0.1%	**5**	**0.002%**
Go Power	-	0%	7	0.01%	752	9.1%	**759**	**0.3%**
Flogas	-	0%	-	0%	937	11.3%	**937**	**0.4%**
Total	**141,527**	**100%**	**79,938**	**100%**	**8,294**	**100%**	**229,759**	**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 77.5%.

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

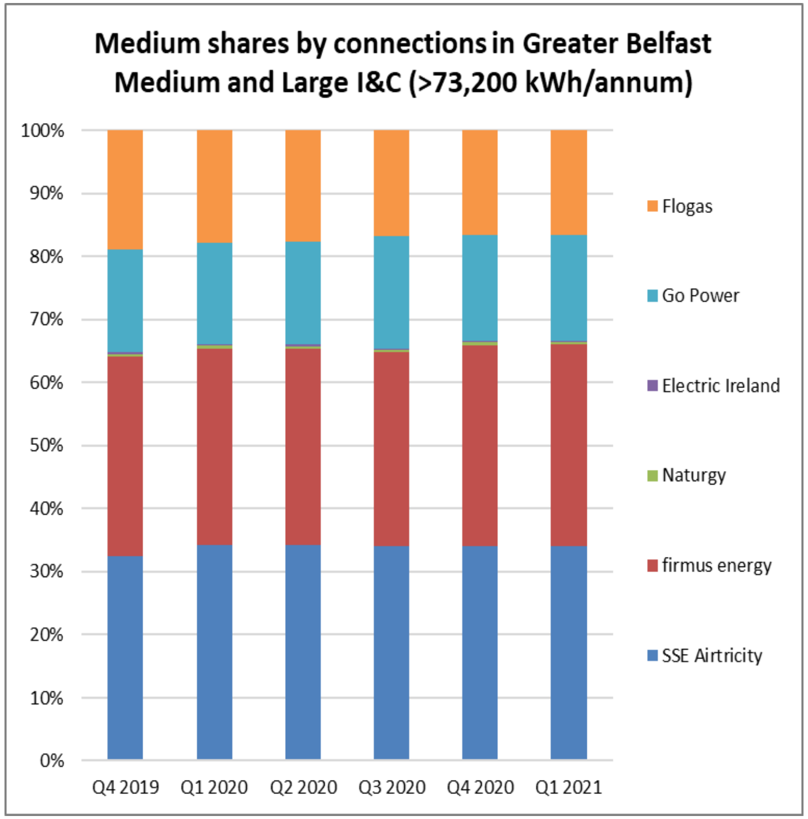
The table below shows the market shares for each supplier within the medium and large I&C sector (i.e. I&Cs with consumption over 73,200 kWh per annum) in the Greater Belfast area at the end of March 2021. The corresponding graph shows the change in market shares by supplier within the same sector over the last eighteen months.

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

End of Q1 2021

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	945	34.2%	99	35.6%	34	28.1%	**1,078**	**34.1%**
firmus energy	881	31.9%	91	32.7%	39	32.2%	**1,011**	**32.0%**
Naturgy	10	0.4%	-	0%	2	1.7%	**12**	**0.4%**
Electric Ireland	-	0%	-	0%	7	5.8%	**7**	**0.2%**
Go Power	429	15.5%	62	22.3%	39	32.2%	**530**	**16.8%**
Flogas	497	18.0%	26	9.4%	-	0%	**523**	**16.5%**
Total	**2,762**	**100%**	**278**	**100%**	**121**	**100%**	**3,161**	**100%**

Source: PNGL



Competition in the medium and large I&C market is more active in the Greater Belfast area. At the end of Q1 2021, SSE and firmus continue to have the majority share of the medium and large I&C market, with 34.1% and 32.0% respectively. Out of the six active suppliers at the end of Q1 2021, 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 Q1 2021. 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 Q1 2021

Supplier	Total for Domestic and Small I&C Sector (MWh)	% share
SSE Airtricity	871,862	75.6%
firmus energy	263,528	22.8%
Naturgy	40	0.003%
Go Power	7,576	0.7%
Flogas	10,503	0.9%
Total	**1,153,509**	**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 Q1 2021 was 75.6% compared with 74.8% in the same period last year. firmus energy's market share for the period Q1 2021 was 22.8% (compared with 23.6% 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.

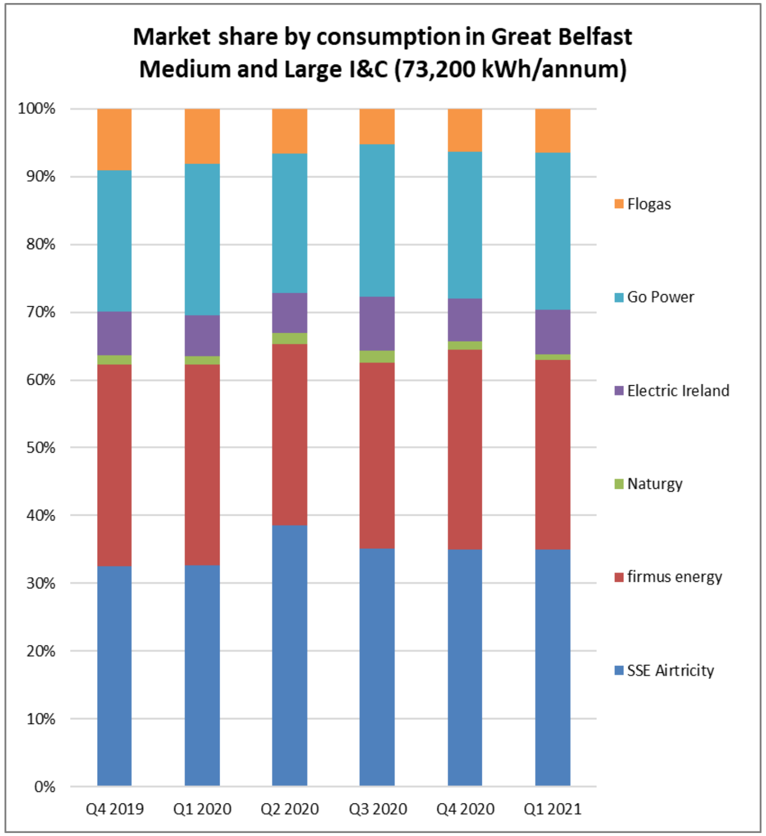
[16] Gas consumption is presented in this QTR in MWh.
[17] The domestic and small I&C sector relates to any customers using less than 73,200 kWh per annum.

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 Q1 2021. 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
Q1 2021

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	77,773	35.5%	48,695	38.6%	106,702	33.2%	**233,170**	**35.0%**
firmus	76,288	34.8%	38,111	30.2%	71,583	22.3%	**185,982**	**27.9%**
Naturgy	815	0.4%	-	0%	5,426	1.7%	**6,241**	**0.9%**
Electric Ireland	-	0%	-	0%	43,395	13.5%	**43,395**	**6.5%**
Go Power	31,540	14.4%	28,435	22.5%	94,227	29.3%	**154,202**	**23.1%**
Flogas	32,591	14.9%	10,941	8.7%	-	0%	**43,532**	**6.5%**
Total	**219,007**	**100%**	**126,182**	**100%**	**321,333**	**100%**	**666,522**	**100%**

Source: PNGL



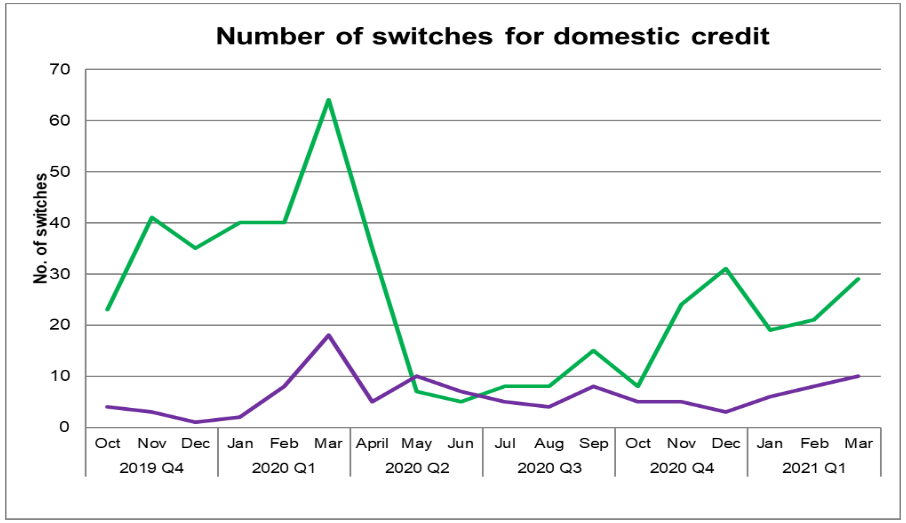
Market share by consumption fluctuates throughout the year due to the movement of customers between suppliers, and also due to the amount of gas consumed by each customer during different seasons (as gas usage can be weather dependent for many, but not all, customers).

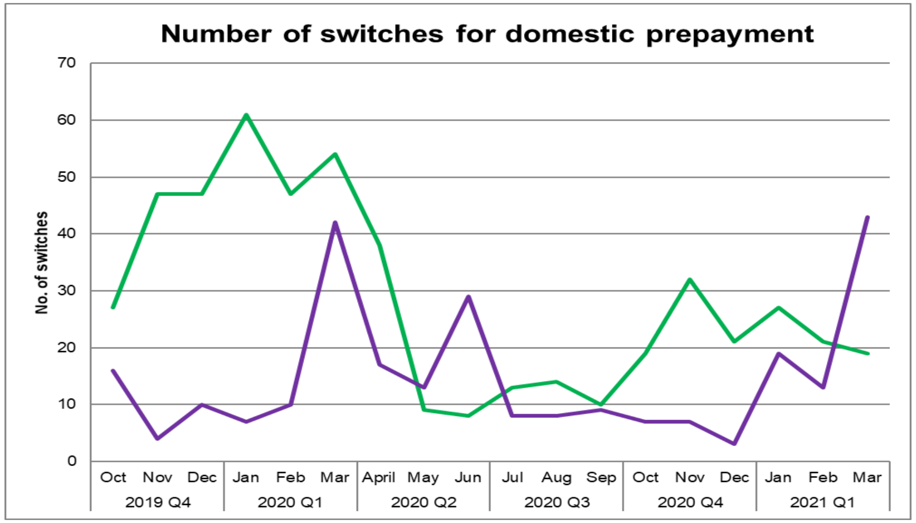
SSE Airtricity and firmus energy both have the majority share by consumption in the medium and large I&C market with 35.0% and 27.9% respectively.

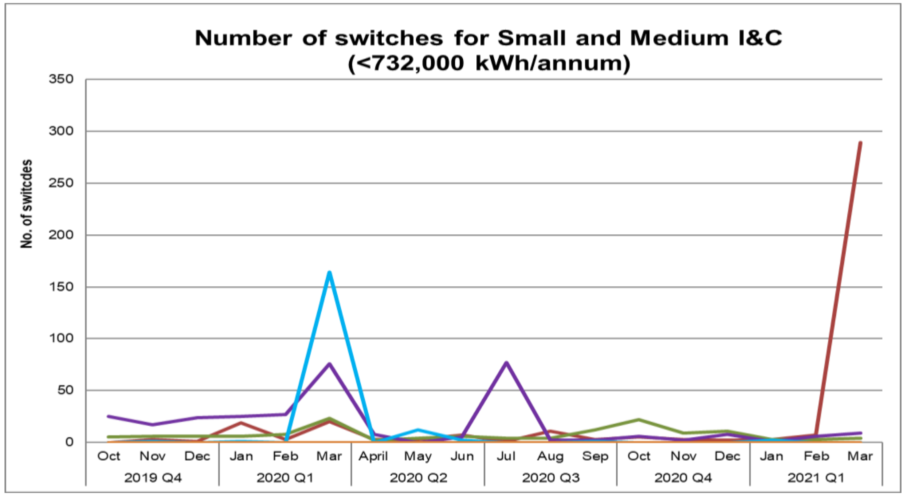
[18] The medium and large I&C sector relates to any customers with annual consumption that is greater than or equal to 73,200 kWh per annum.

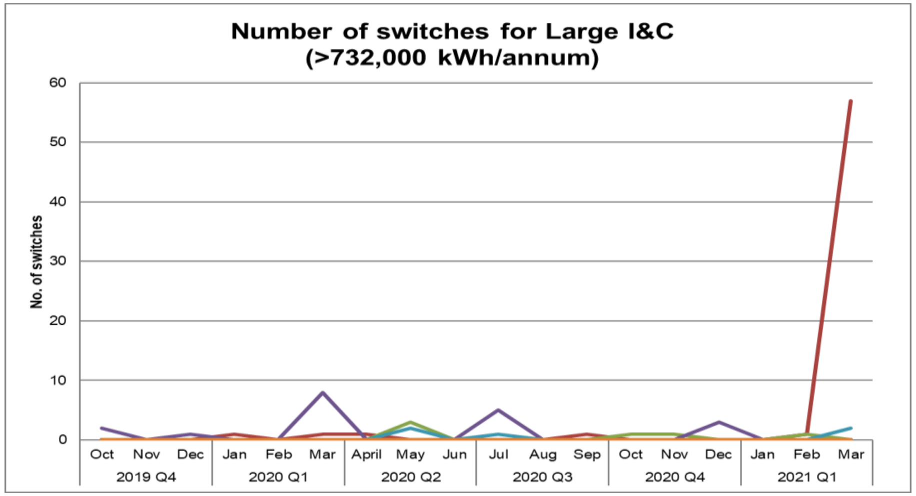
4.3 Market activity in the Greater Belfast area

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.









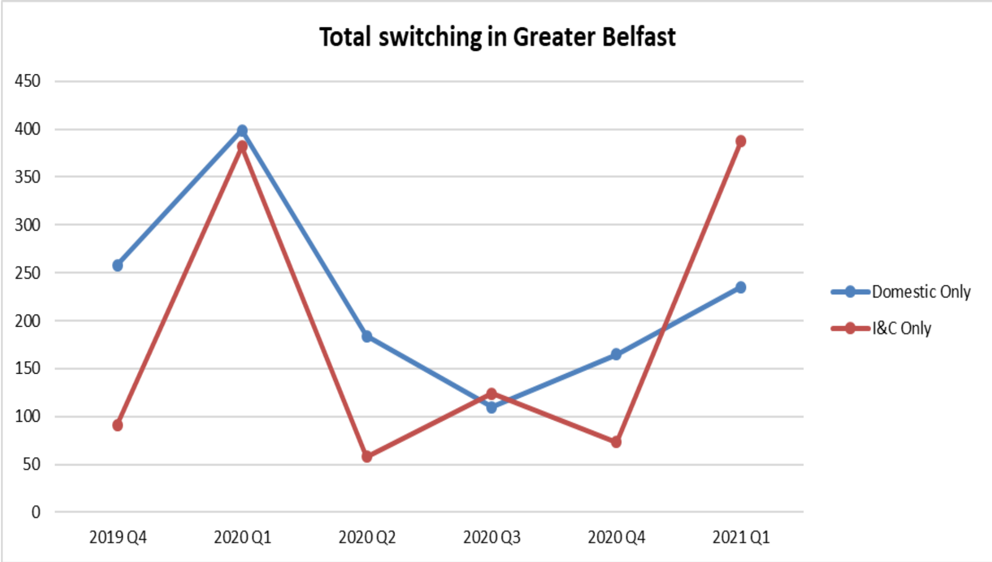
There are only two active suppliers in the domestic market. The I&C graphs above represent the split between the small and medium I&C customers (i.e. customers consuming less than 732,000 kWh per annum) and large I&C consumers (i.e. consuming more than 732,000 kWh per annum).

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 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%
2020 Q4	165	0.1%	73	0.6%	238	0.1%
2021 Q1	235	0.1%	388	3.4%	623	0.3%

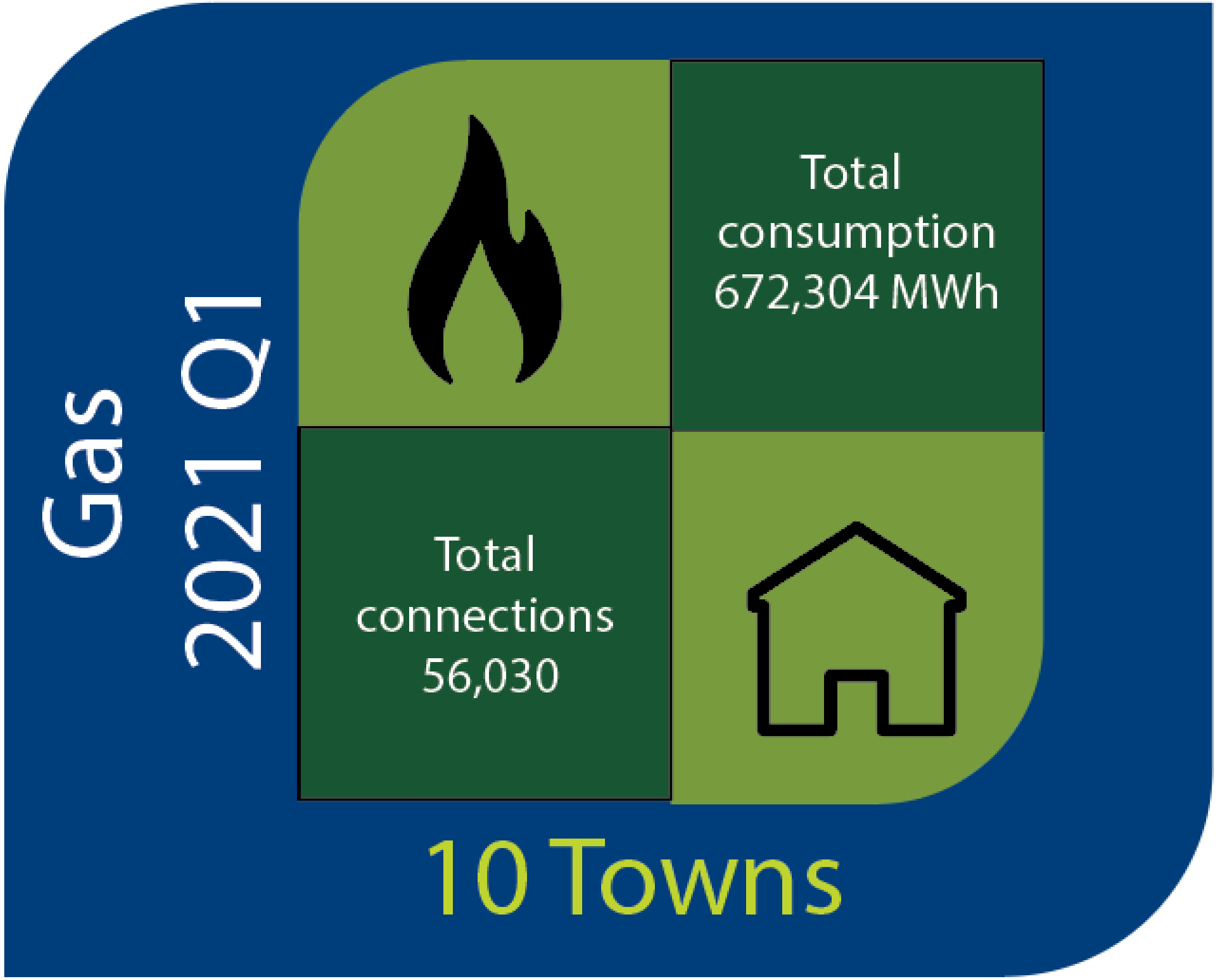
Source: PNGL



The graph to the right represents the total number of switches completed on a quarterly basis, split by the domestic and I&C markets. With the exception of spikes in Q1 2020 and Q2 2021, the graph shows that the overall level of switching has remained around 0.1%.

The domestic switching for the period Q1 2021 remained static at 0.1%. I&C switching saw an increase from 0.6% to 3.4% 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 March 2021 and the consumption in this area during January to March 2021.

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

Q1 2021

Market segment	Number of connections	% share of connections in sector	Consumption (MWh)[19]	% share of consumption in sector
Domestic prepayment	43,345	79.1%	173,578	71.0%
Domestic credit	9,864	18.0%	70,959	29.0%
I&C < 73,200 kWh	1,588	2.9%		
Total Domestic and Small I&C[20]	**54,797**	**100%**	**244,537**	**100%**
I&C 73,200 to 732,000 kWh	981	79.6%	86,892	20.3%
I&C 732,001 to 2,196,000 kWh	165	13.4%	70,187	16.4%
I&C > 2,196,000 kWh	87	7.1%	270,688	63.3%
Medium & Large I&C[21]	**1,233**	**100%**	**427,767**	**100%**
Total	**56,030**		**672,304**	

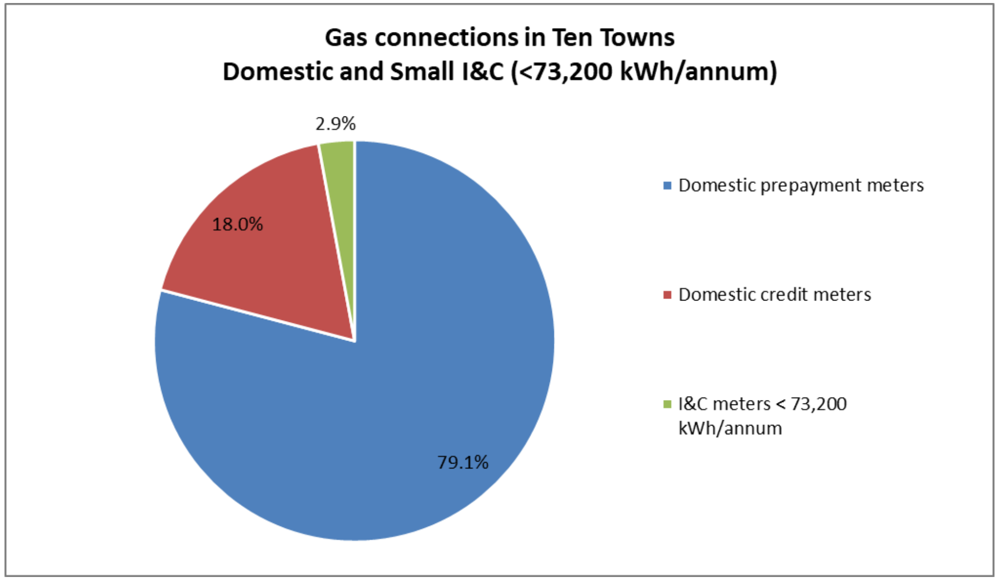
Source: feDL

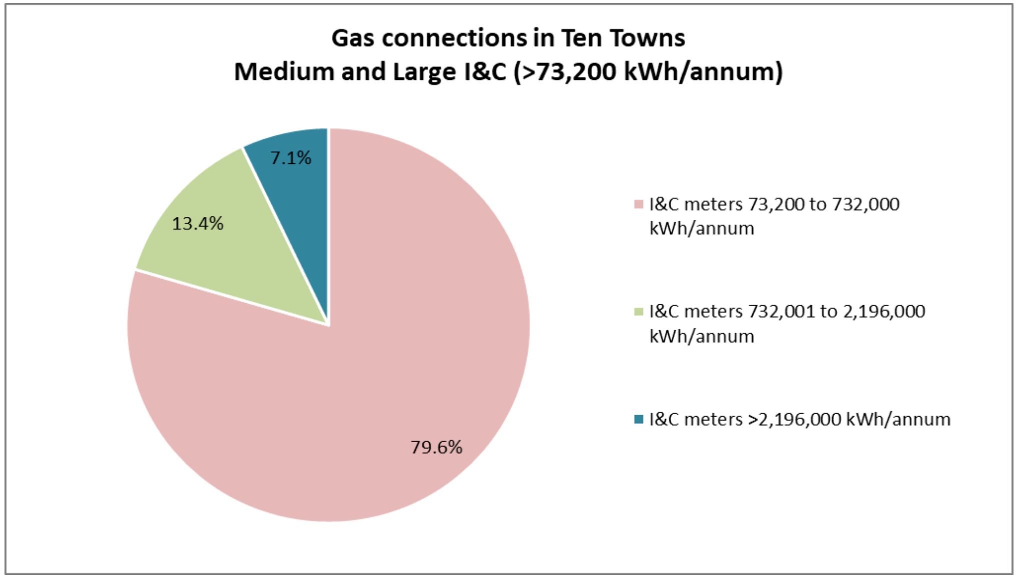
At the end of March 2021, the domestic and small I&C connections represent 97.8% of the total connections and 36.4% of consumption. The remaining 2.2% are medium and large I&C connections and represent 63.6% of total consumption in this area.

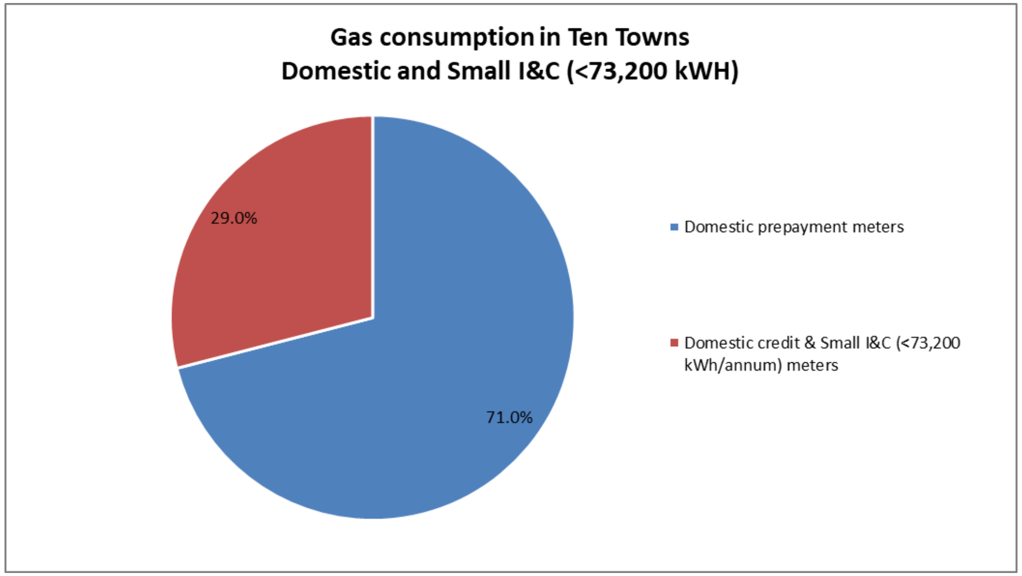
Within the domestic sector, 81.5% of the domestic connections use prepayment meters and 18.5% use credit meters to pay for their gas.

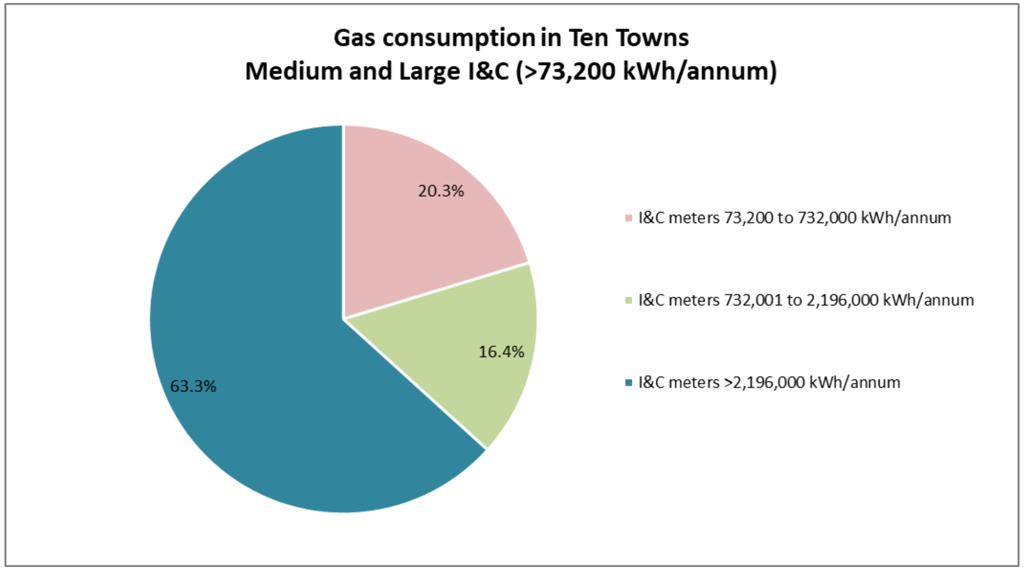
The charts on the following page show the numbers of gas connections in the Ten Towns area at the end of March 2021 and the consumption in this area during January to March 2021.

[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%
18.0%
79.1%
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)
7.1%
13.4%
79.6%
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)
29.0%
71.0%
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)
20.3%
16.4%
63.3%
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 March 2021 and the market shares in terms of consumption are for the period January to March 2021.

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 Q1 2021, 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 Q1 2021

Supplier	Domestic prepayment		Domestic credit		I&C < 73,200 kWh		Total for Domestic and Small I&C	
SSE Airtricity	-	0%	-	0%	104	6.5%	**104**	**0.2%**
firmus energy	43,345	100%	9,864	100%	1,017	64.0%	**54,226**	**98.9%**
Go Power	-	0%	-	0%	138	8.7%	**138**	**0.3%**
Flogas	-	0%	-	0%	329	20.7%	**329**	**0.6%**
Total	**43,345**	**100%**	**9,864**	**100%**	**1,588**	**100%**	**54,797**	**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 64.0% share at the end of Q1 2021. 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 Q1 2021, the collective market share of these three suppliers was 36.0%.

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

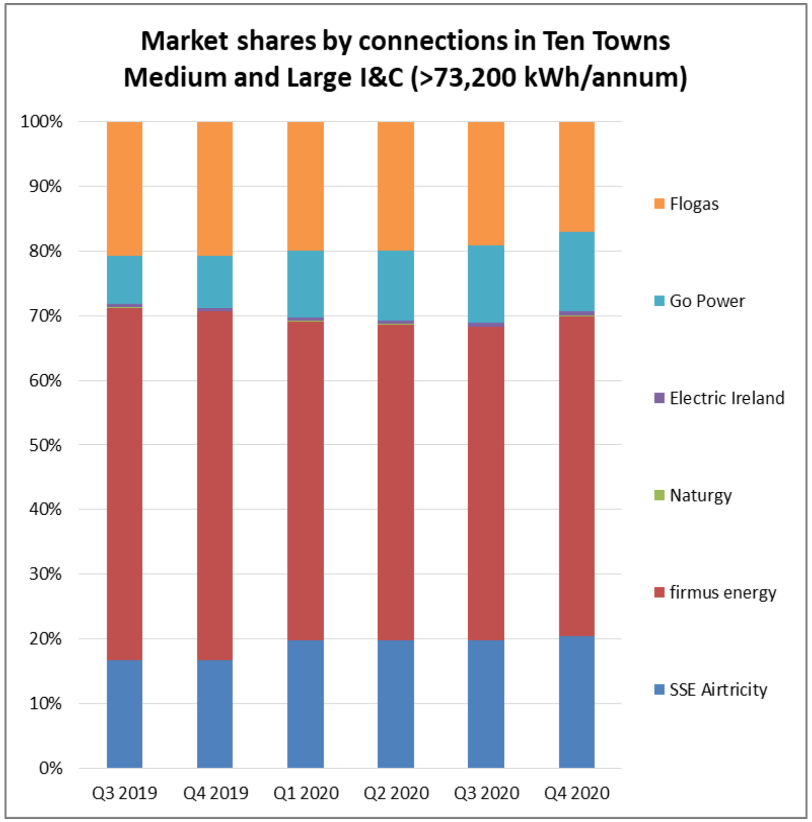
The following table shows the market shares for each supplier within the medium and large I&C sector (i.e. I&Cs with consumption over 73,200 kWh per annum) in the Ten Towns area at the end of Q1 2021. The corresponding graph shows the change in market shares by supplier within the same sector over the last eighteen months.

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

End of Q1 2021

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	183	18.7%	47	28.5%	21	24.1%	**251**	**20.4%**
firmus energy	486	49.5%	82	49.7%	44	50.6%	**612**	**49.6%**
Naturgy	-	0%	-	0%	-	0%	**-**	**0%**
Go Power	117	11.9%	23	13.9%	15	17.2%	**155**	**12.6%**
Flogas	195	19.9%	13	7.9%	-	0.0%	**208**	**16.9%**
Electric Ireland	-	0%	-	0%	7	8.1%	**7**	**0.6%**
Total	**981**	**100%**	**165**	**100%**	**87**	**100%**	**1,233**	**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 20.4%, 16.9% and 12.6% respectively at the end of March 2021. The market share of firmus energy, the incumbent supplier, stands at 49.6%.

[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 January to March 2021.

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

Q1 2021

Supplier	Total for Domestic and Small I&C Sector (MWh)	% share
SSE Airtricity	1,340	0.6%
firmus energy	237,811	97.2%
Go Power	1,528	0.6%
Flogas	3,857	1.6%
Total	**244,537**	**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 Q1 2021 their combined market share in terms of consumption in the domestic and small I&C market was 2.8%. This is a similar level when compared to the same quarter last year (2.6%).

[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.

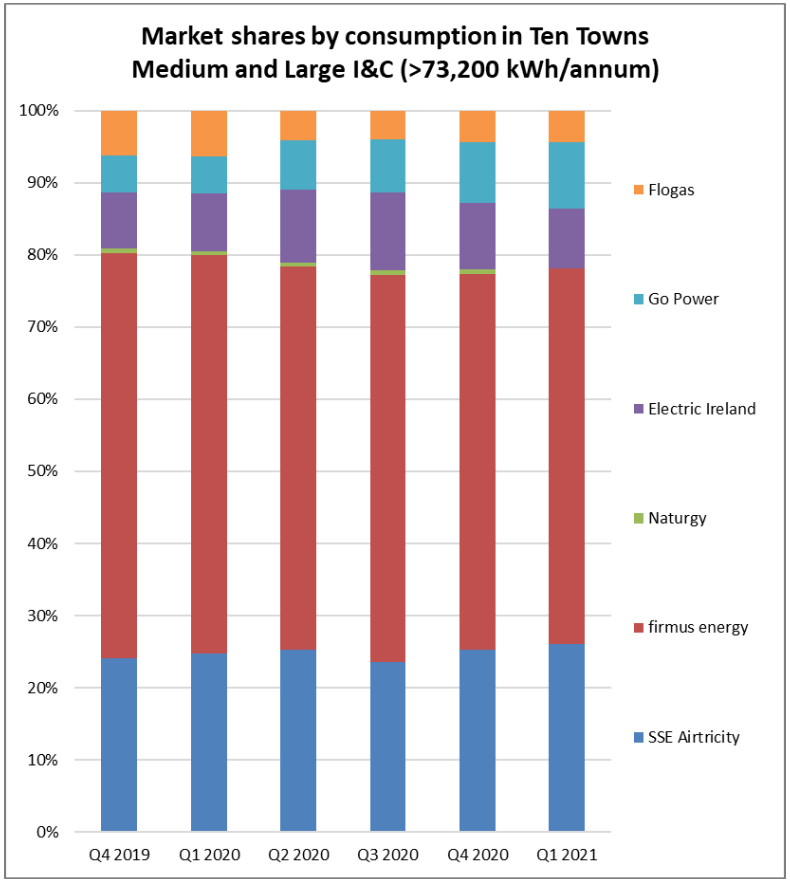
The table below shows the market shares for each supplier within the medium and large I&C sector (I&Cs using more than 73,200 kWh per annum) in the Ten Towns area during Q1 2021.

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

Q1 2021

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	18,906	21.8%	21,798	31.1%	70,872	26.2%	**111,576**	**26.1%**
firmus energy	42,603	49.0%	35,366	50.4%	144,374	53.3%	**222,343**	**52.0%**
Naturgy	-	0%	-	0%	316	0.1%	**316**	**0.1%**
Go Power	11,182	12.9%	8,335	11.9%	19,845	7.3%	**39,362**	**9.2%**
Flogas	14,184	16.3%	4,688	6.7%	56	0.02%	**18,928**	**4.4%**
Electric Ireland	17	0.02%	-	0%	35,225	13.0%	**35,242**	**8.2%**
Total	**86,892**	**100%**	**70,187**	**100%**	**270,688**	**100%**	**427,767**	**100%**

Source: feDL

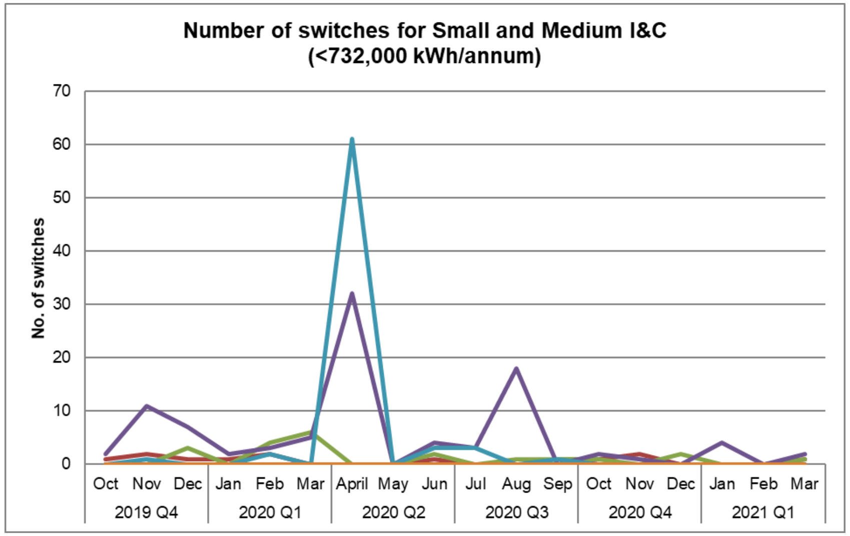


In terms of market share by consumption, firmus energy retains the largest share of the medium and large I&C sector. At the end of Q1 2021, firmus energy has 52.0% share of this market sector, which is a decrease when compared to Q1 2020 (55.2%).

[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.



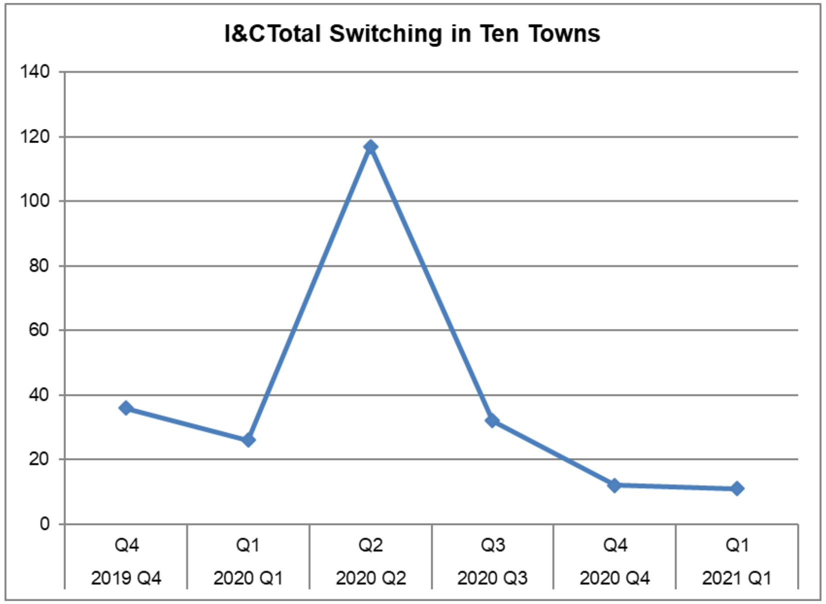
The table below shows market activity through the number of switches on a quarterly basis in the Ten Towns gas market and the associated percentage switching rate. The switching rate percentages are calculated using the number of quarterly switches divided by the number of customers at the end of the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

Table 23 I&C activity in the Ten Towns area

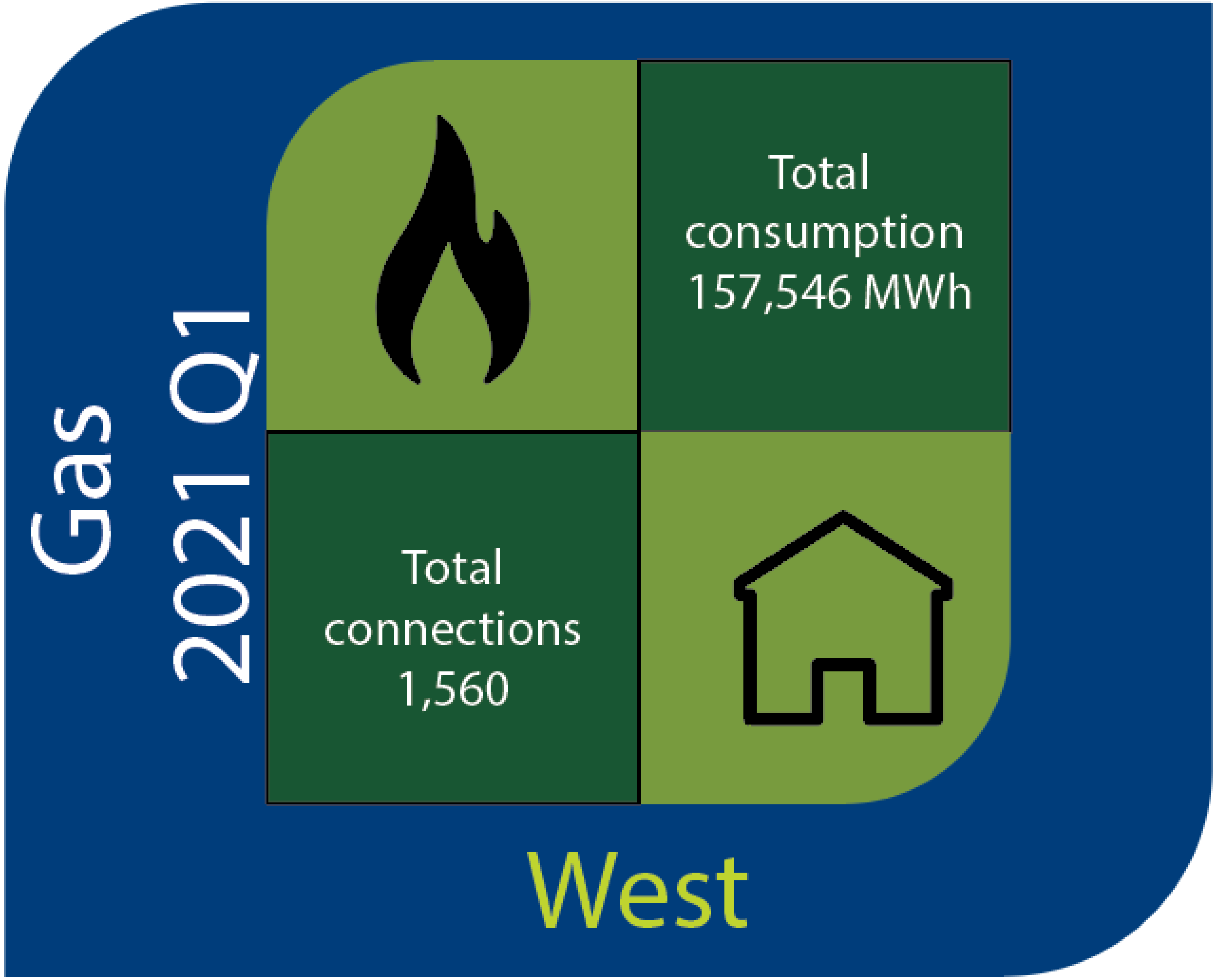
2019 Q4	36	1.3%
2020 Q1	26	0.9%
2020 Q2	117	4.2%
2020 Q3	32	1.1%
2020 Q4	12	0.4%
2021 Q1	11	0.4%

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 continued to decrease and in the current quarter switching levels are at their lowest for the last six quarters at 0.4%.



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 March 2021 and the consumption in this area during January to March 2021

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

Q1 2021

Market segment	Number of connections	% share of connections in sector	Consumption (MWh)[27]	% share of consumption in sector
Domestic prepayment	1,011	66.1%	4,291	63.4%
Domestic credit	503	32.9%	2,477	36.6%
I&C < 73,200 kWh	16	1.0%		
Total Domestic and Small I&C[28]	1,530	**100%**	**6,769**	**100%**
I&C 73,200 to 732,000 kWh	11	36.7%	1,151	0.8%
I&C 732,001 to 2,196,000 kWh	5	16.7%	1,870	1.2%
I&C > 2,196,000 kWh	14	46.7%	147,756	98.0%
Medium & Large I&C[29]	**30**	**100%**	**150,777**	**100%**
Total	**1,560**		**157,546**	

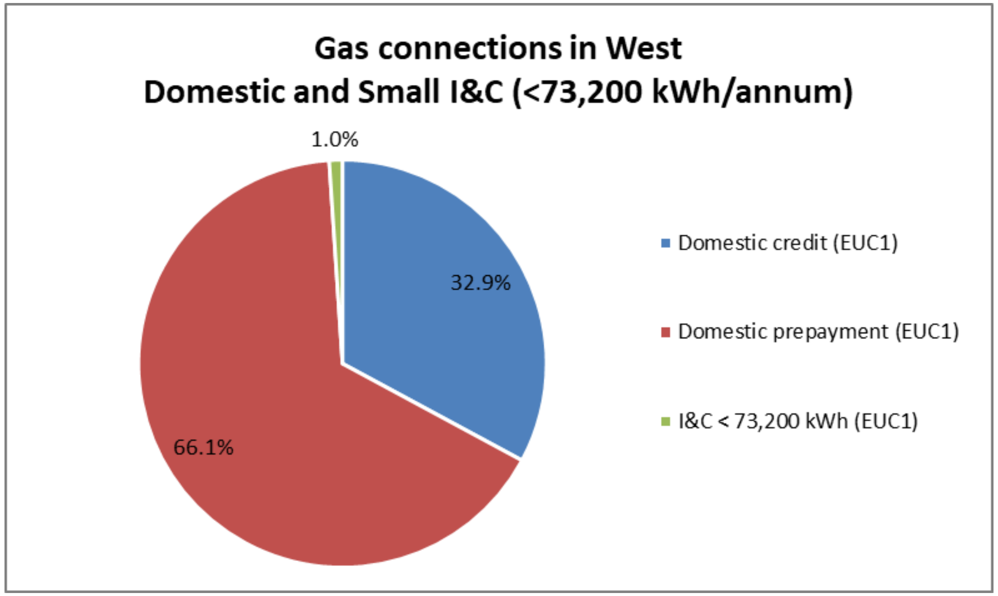
Source: SGN NG

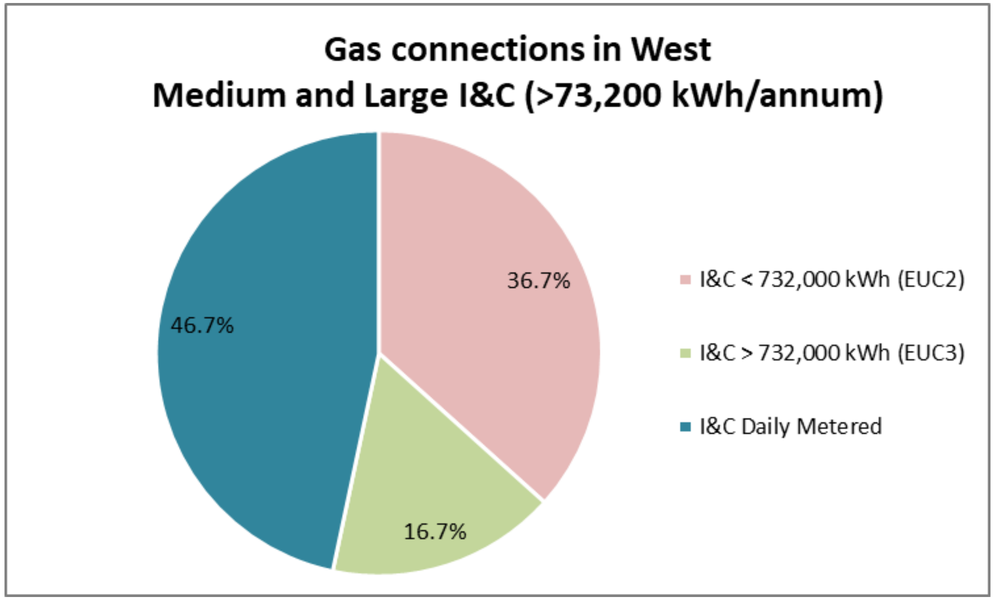
At the end of March 2021, the domestic and small I&C connections represent 98.1% of the total connections and 4.3% of consumption. The remaining 1.9% are medium and large I&C connections and represent 95.7% of total consumption in this area. Within the domestic sector, 66.8% use prepayment meters and 33.2% use credit meters to pay for their gas.

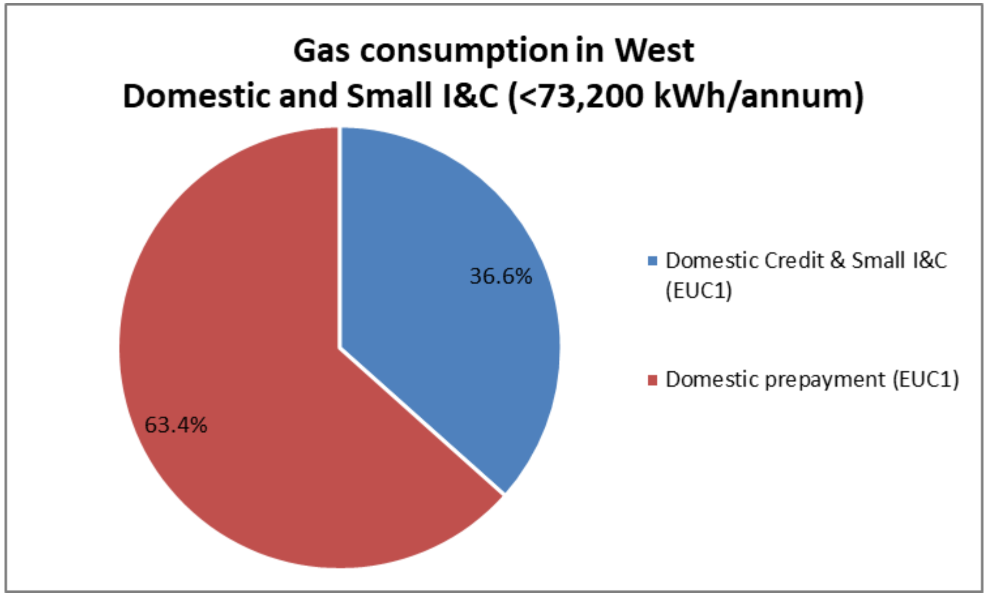
There are now 5 active suppliers in the West area, namely SSE Airtricity Gas NI (as the commissioning domestic supplier), with Electric Ireland, firmus energy, Flogas and Go Power active in the I&C market.

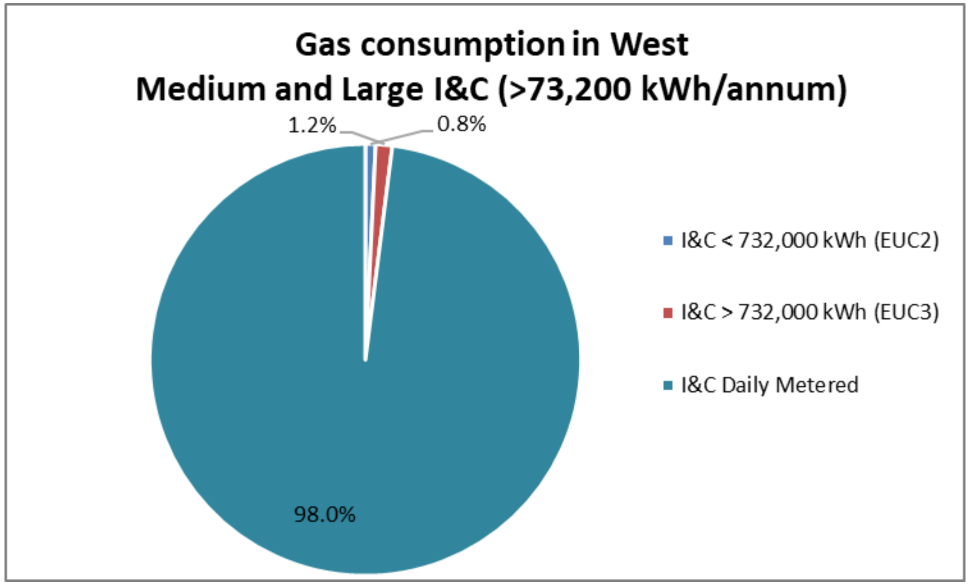
[28] The domestic and small I&C sector relates to any customers using less than 73,200 kWh per annum. The consumption information for domestic credit and small I&C are combined as this information is not available to us with a full split.

[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)
1.0%
32.9%
66.1%
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)
36.7%
46.7%
16.7%
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)
36.6%
63.4%
Domestic Credit & Small I&C (EUC1)
Domestic prepayment (EUC1)

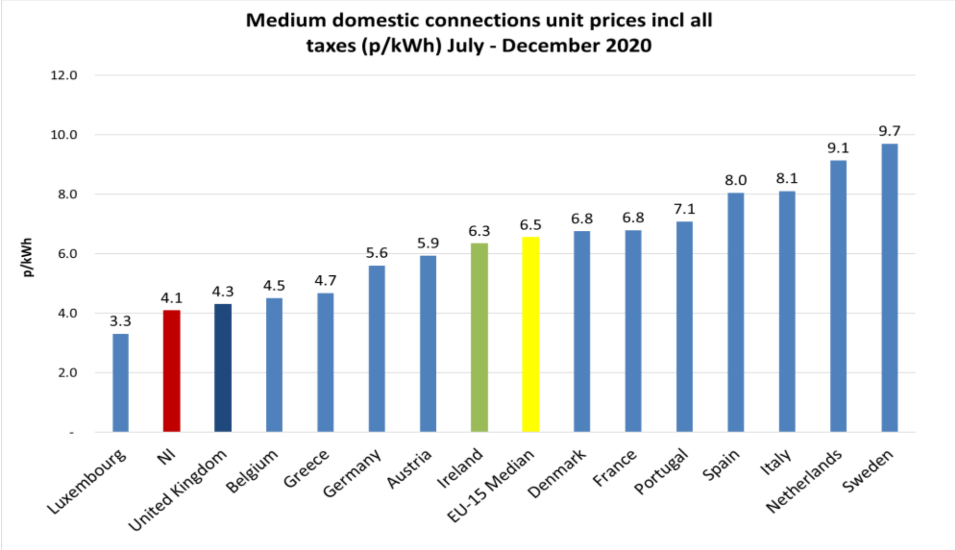

Gas consumption in West
Medium and Large I&C (>73,200 kWh/annum)
1.2%
0.8%
98.0%
I&C < 732,000 kWh (EUC2)
I&C > 732,000 kWh (EUC3)
I&C Daily Metered

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 July to December 2020 (semester 2). In the domestic graph show below, we use unit prices which include Climate Change Levy (CCL) and includes 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 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.

At the time of publication, there was no UK medium domestic figure available from BEIS (and the semester 1 2020 prices are used). This will be updated during the next publication of the QTR (pending availability of data).

[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 2: July to December 2020), there was a decrease to the regulated tariff within the Ten Towns area. Further detail on these regulated tariffs are available in the UR tariff review briefing notes[32]. The table below illustrates the regulated tariffs for S2 2020 period.

Table 25 Regulated Gas Supply Tariffs

01 April to 30 September	Greater Belfast 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
Following Regulated Tariff Reviews:		
01 October to Present	**Greater Belfast & West SSE Airtricity**	**Ten Towns firmus energy**
Domestic Regulated Tariff Usage for first 2,000 kWh	5.291 p/kWh	5.04 p/kWh
Domestic Regulated Tariff Usage >2,000 kWh	3.626 p/kWh	3.40 p/kWh

[32] Firmus energy (Supply) Ltd October 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 November 2020: bright
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.