

Customer engagement survey report

2024/25 Planning cycle
February 2024 update

LTS Planning/Network Capacity Team



SGN

Your gas. Our network.

Objective

The purpose of this report is to summarise the outcomes of the annual customer engagement survey held with the top ten stakeholders in each LDZ during January to early February each year. It must be noted that in some cases we will not have been able to make any progress with finding a suitable contact to engage with. The reasons for this are pointed out in the report.

For 2024/25 planning cycle LTS planning/Network Capacity made efforts to engage directly with our top 10 customers in each LDZ as part of the drive to understand current demand requirements as well as future demands including hydrogen potential. This workload would ideally have been completed by the end of January to be able to fully inform the annual forecasting process however due to a delay in responses we continued this work into and after February.

The minimum objective is to engage with the top ten customers in each LDZ and as resources allow the next ten. For 2024/25 the top ten were defined by AQ as per general methodology employed across other planning areas however for the next planning cycle we will review this against the SOQ daily volume to determine if a more suitable appraisal of the impact on planning can be arrived at.

Results

The results of the engagement workload are held within the LTS Planning stakeholder area of the LTDS/ECPG/Stakeholder MS Teams site.

As a minimum each folder should contain the following information;

- Extract from Geofield showing the site – this can be important if speaking to the end user if they are trying to make a point that relates to site layout or local geography. An extract from Google maps is also useful for the same reason.
- Crib sheet which covers any knowledge of local issues, recent load enquiries etc. This can become important as we may be asked about progress on enquiries.
- Sheet with any information on annual burns or maximum daily burns
- Known contacts with a note of where this information came from.
- Blank proforma that will cover planned questions. This needs to be checked and clarified with LTS Manager in light of any discussions with other parts of the business. This may result in an increase or decrease of questions being asked.

Summary

The customer base have a variety of estimates on future energy consumption. Some sites have committed to Zero Carbon within determined timescales and are in the process of tailoring gas consumption with this in mind. Others intend to continue with existing patterns for the next 5-10 years. However, in those cases there will always be market factors relevant to specific users. Embedded power sites will be affected by their rankings in the electricity generation bid stack and the prevailing development of electrical infrastructure. Manufacturing customers will be dependent on economic factor such as market growth at home and abroad.

With regards to blended gas and hydrogen, several companies are ready for blended gas with a few organisations stating blending up to 20% hydrogen should not be a serious problem for them. Few sites indicated they are in a position to accept 100% hydrogen as yet. There are definite steps taking place and project teams looking at energy alternatives to natural gas within the large user group. All those we have managed to speak to have expressed an interest in engaging more with SGN on this.

A small number of customers have expressed an interest in biogas injection. We have supplied contact details of the regulated Green Gas team and also a more generic organisation ABDA. Some also showed interest in hydrogen injection.