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Greater Manchester Stakeholder Regional Event

3 October 2022

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Welcome

Paul Bircham

Engagement and Regulatory Strategy Director

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We distribute electricity across the North West



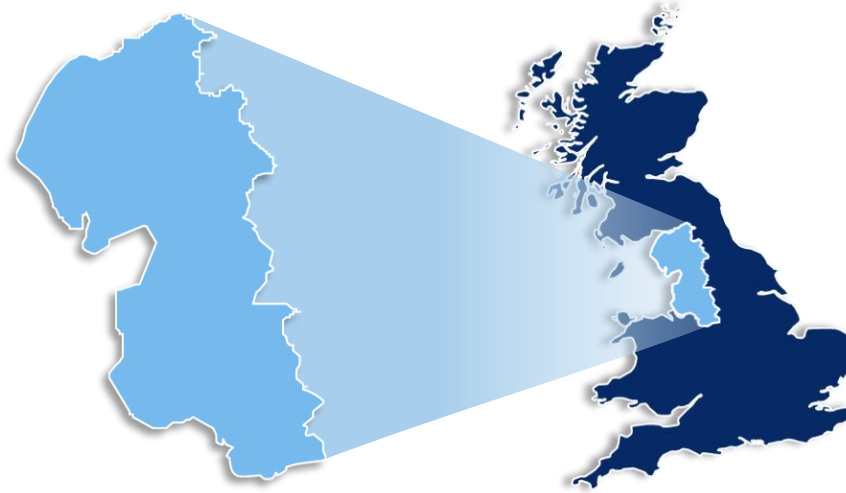
5 million



2.4 million



23 terawatt hours



£12.3 billion assets, including 56,000km of network

We invest £1m in the network every day

19 grid supply points; 96 bulk supply substations;
363 primary substations; and 33,000 transformers

We are a regulated monopoly
Customers cannot choose their network company

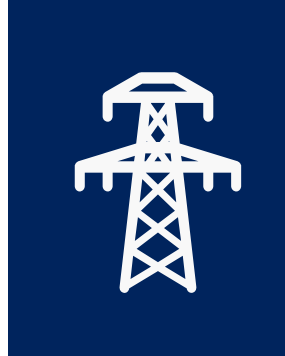
**POWER CUT?
CALL 105**



Agenda



Welcome &
intro



RIIO-ED2
update



Cost of living



Roundtable
discussion



Break



Low Carbon
Technologies
& Net Zero



Roundtable
discussion



Q&A

Session will include

Our commitment for
2023-2028

Regional trends & insights

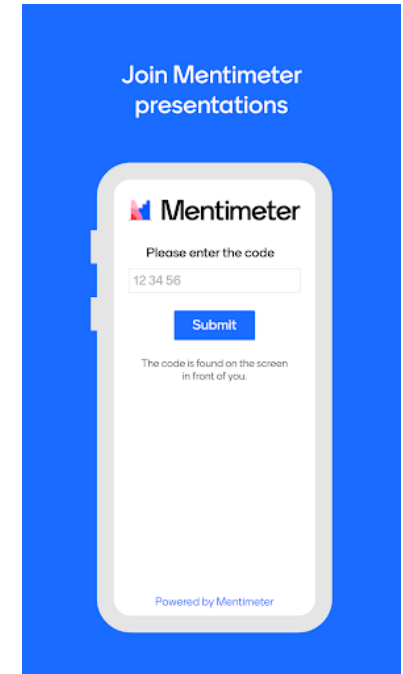
Support for customers in
vulnerable circumstances

Supporting customers
with LCT connections



We want to find out more about you:

- Open web browser
- Head to **www.menti.com**
- Use the code **36970959** to access round one of polling
- Please answer the three questions





Q1: What type of stakeholder are you?

- Domestic customer / consumer interest group
- Housing Association or similar
- Business customer (or representative)
- Developer / connections representative
- Environmental charity or representative
- Social charity or community group
- Local Authority / government
- Academic / educational institute
- Utility representative (gas, water, electricity)
- Other

Q2: Where are you joining us from today / the area that you represent?

- Cumbria
- Lancashire
- Greater Manchester
- Other

Q3: How often do we engage with you?

- I regularly attend a Stakeholder Advisory Panel or expert panel
- I attend innovation, low carbon, community energy or connections workshops
- I am in regular contact with ENWL
- I have occasional contact with ENWL
- I am new to this – I've have never met or contacted ENWL before

Menti.com

Code: 36970959



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Ofgem's Draft Determination for RIIO-ED2

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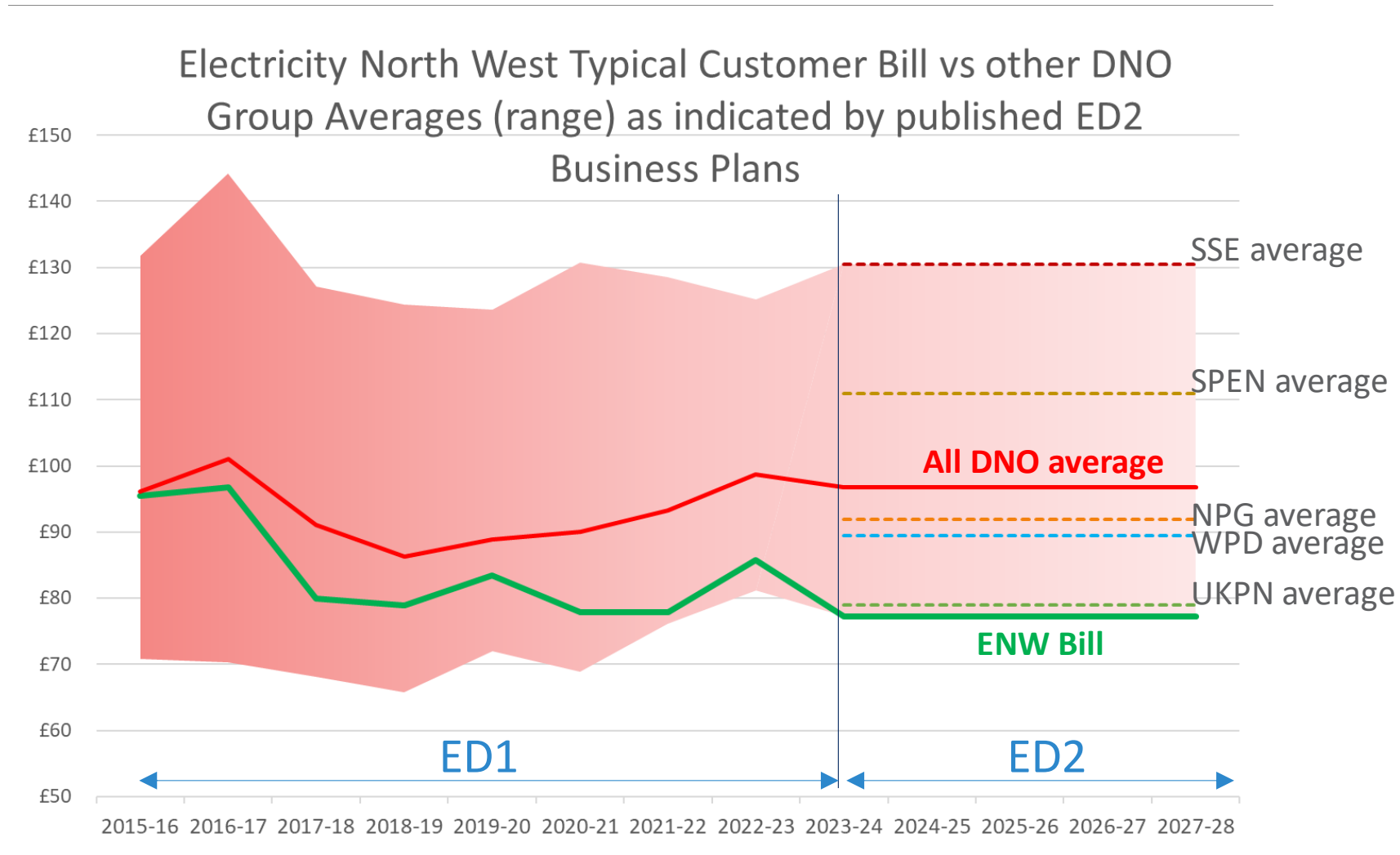
- We've engaged with 18,000 customers and stakeholders to develop our plans for 2023-2028 to make sure they reflect the wants, needs and views of the region.
- We submitted a comprehensive plan and Ofgem has now given us its initial view.

What did Ofgem want?	What did our plan propose?
In very simple terms, Ofgem wanted to see net zero delivered by networks at lowest cost to customers	£1.8bn investment, including £200m extra to deliver net zero while reducing our part of the bill by at least 5.5%

We recently retested the acceptability of our plans with domestic and business customers and found that **84%** found the plan acceptable.

Despite us proposing the lowest bill of any DNO group, Ofgem has still proposed to take out more than £200m of funding, and reject a number of key projects that will have a significant impact on the region.

Our part of bills is going down



Our scorecard for Ofgem's Draft Determination



Comprehensive Scope – does it include what North West customers and stakeholders asked for?



Dealing with Uncertainty – can it flex in a fast acting and agile manner if customers requirements change?



Driving Performance Improvement – does it set tough targets and encourage continuous improvement?



Challenging Efficiency – does it set stretching but achievable targets for continuous cost reduction?



Sustainable financing – does it keep bills low while ensuring companies can raise the finance to fund essential investment?

Key



Unacceptable



Some issues



Multiple errors



Balanced

What has Ofgem taken out of the plan?



REJECTED

- The support you asked for on net zero transition.

REJECTED

- The enhanced community energy fund to help us scale up and deliver more.

REJECTED

- Network investment in areas of high concentration of vulnerable customers.

REJECTED

- Our LineSIGHT proposal to increasing monitoring of overhead lines for safety.

**£64.35m
investment
removed**

These scope cuts are on top of the c£200m reduction in our plan which will cause further difficulties in delivery and also £100m reduction in financing costs.



There are some things that Ofgem has initially approved in the determination, including:

- £78m for us to roll out our money-saving Smart Street technology to quarter of a million properties to help reduce customers energy costs
- Our proposal for a unique new incentive called 'Dig, Fix and Go' to reduce the average time for emergency street works from 5 days
- Our strategy to support customers in vulnerable circumstances, although Ofgem have currently excluded some specific elements

APPROVED

APPROVED

APPROVED



- Consultation on the draft determinations closed 25 August 2022
- Ofgem considering responses – they will be published by the end of October
- Licence drafting for ED2 is proceeding in parallel
- Ofgem will publish its Final Determination on our business plan at the end of November 2022
- As we then consider how business plan commitments will be affected by the final determination and allowances we will need further stakeholder input
- 1 April 2023 - RIIO-ED2 starts



Customer Support & Financial Vulnerability - Response to the cost of living crisis

Samantha Loukes

Vulnerability and Inclusion Manager

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Regional insights

What we are hearing from customers nationally and within our region

Triangulation of strategic insight August 2022

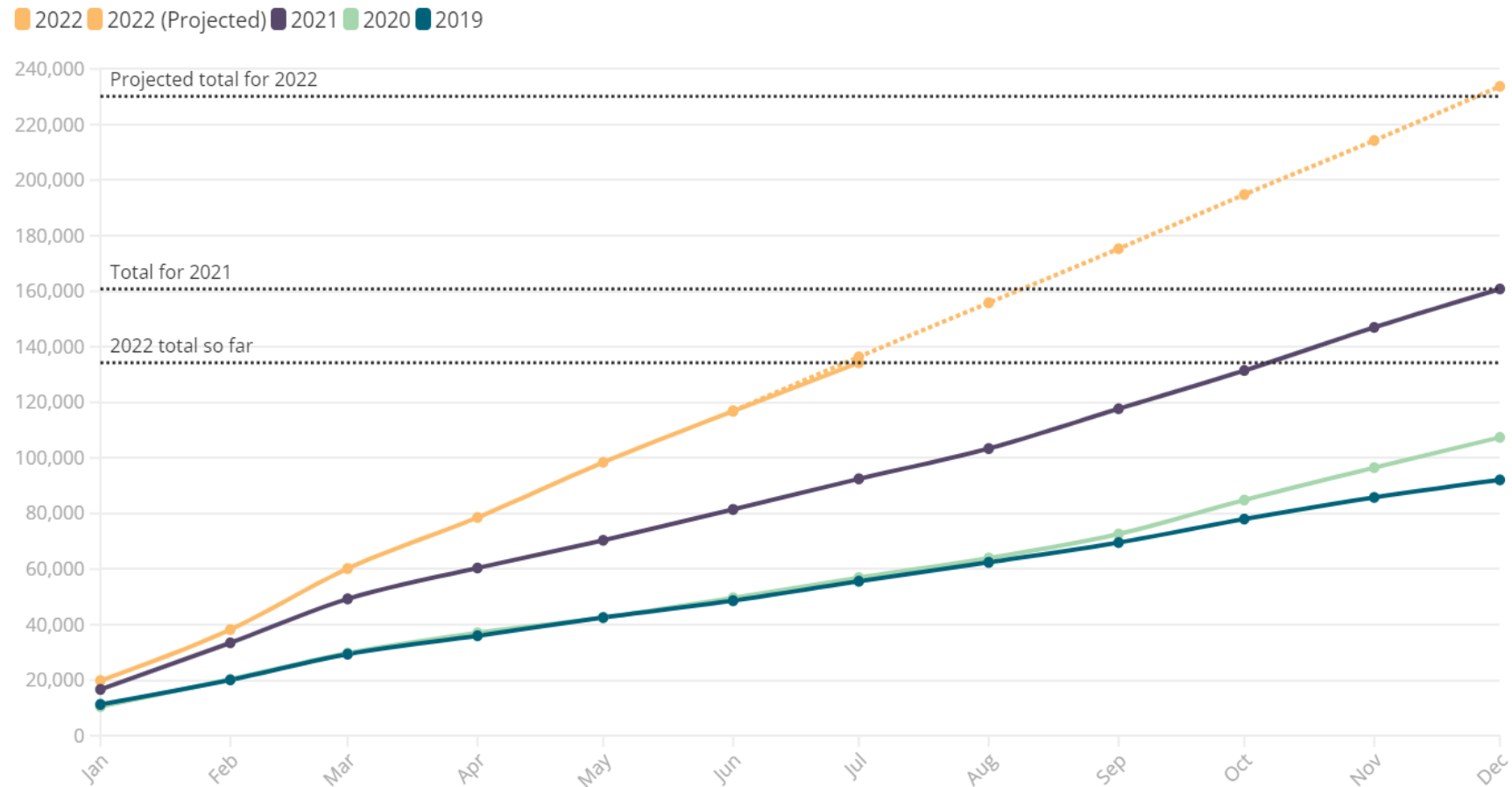


Nationally we're seeing winter problems in summer



- Britain is facing its biggest cost of living crisis in decades.
- Cost of living is overwhelmingly seen as the most important issue facing the country (81%), followed by the quality of NHS healthcare (47%) and threat of climate change (29%)¹.
- The number of people needing support from Citizens Advice² this year has already exceeded the rate for 2020 & 2019.

Cumulative number of people who we've helped with energy issues each year



¹Public First – Insights into public attitudes towards the cost of living crisis – August 2022

²Citizens Advice [cost of living data dashboard](#) August 2022

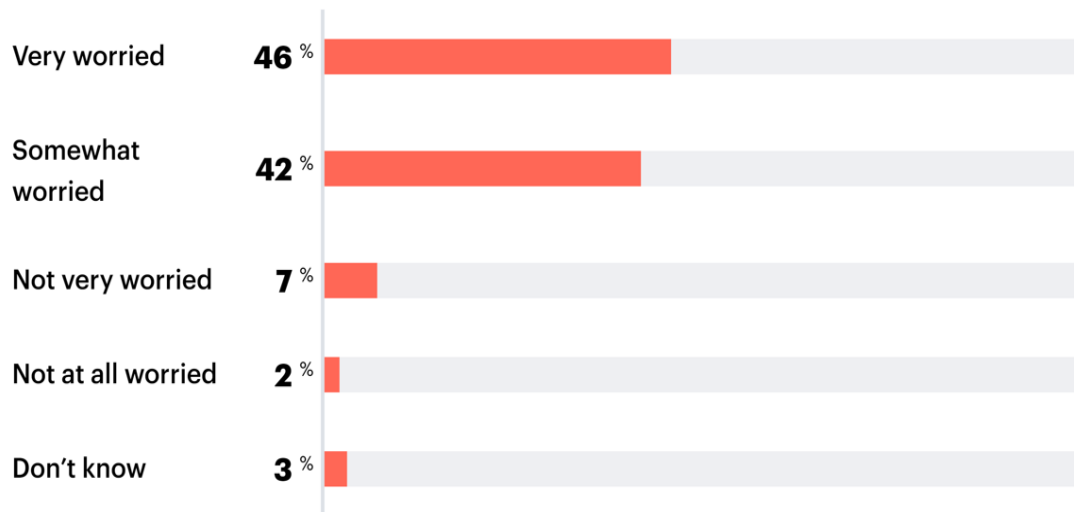
North West consumers are struggling to pay energy bills



Nationally 88% of adults are very or somewhat worried³

How worried are you, if at all, about the rising cost of energy?

All adults (1522 GB adults - Apr 1, 2022)

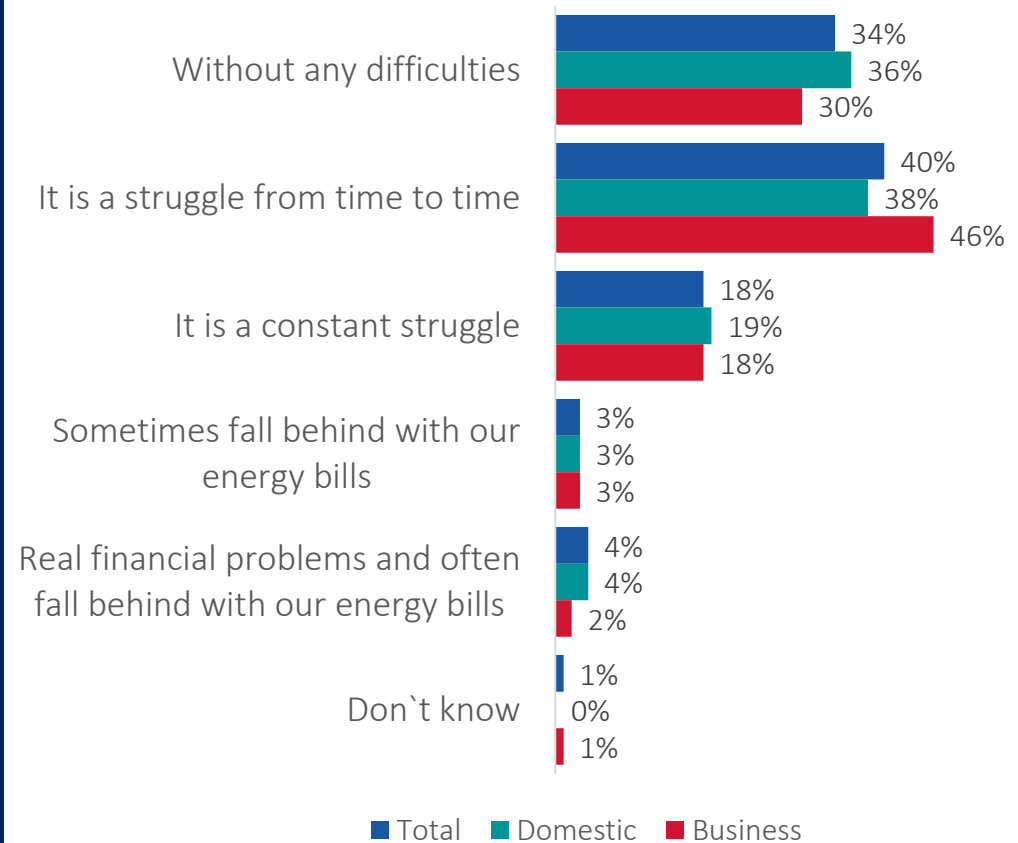


YouGov | What the world thinks

yougov.co.uk

⁴65% of north west bill payers are struggling to pay bills

Energy bill paying situation



³YouGov Results - Energy Bills. Fieldwork: 28th - 29th July 2022

⁴Electricity North West Acceptability Survey. Fieldwork 24th June and 5th July 2022

The worsening costs are not being felt equally across society



- According to the Office for National Statistics⁵, 91% of adults in Great Britain reported an increase in their cost of living between June and July 2022.
- The cost of living crisis is affecting everyone, but it's not affecting us all equally⁶.
 - People on low incomes
 - Long-term health conditions
 - Disabled people⁷ →
 - Pensioners



⁵ Rising cost of living in the UK – House of Commons Briefing – 21 July 2022

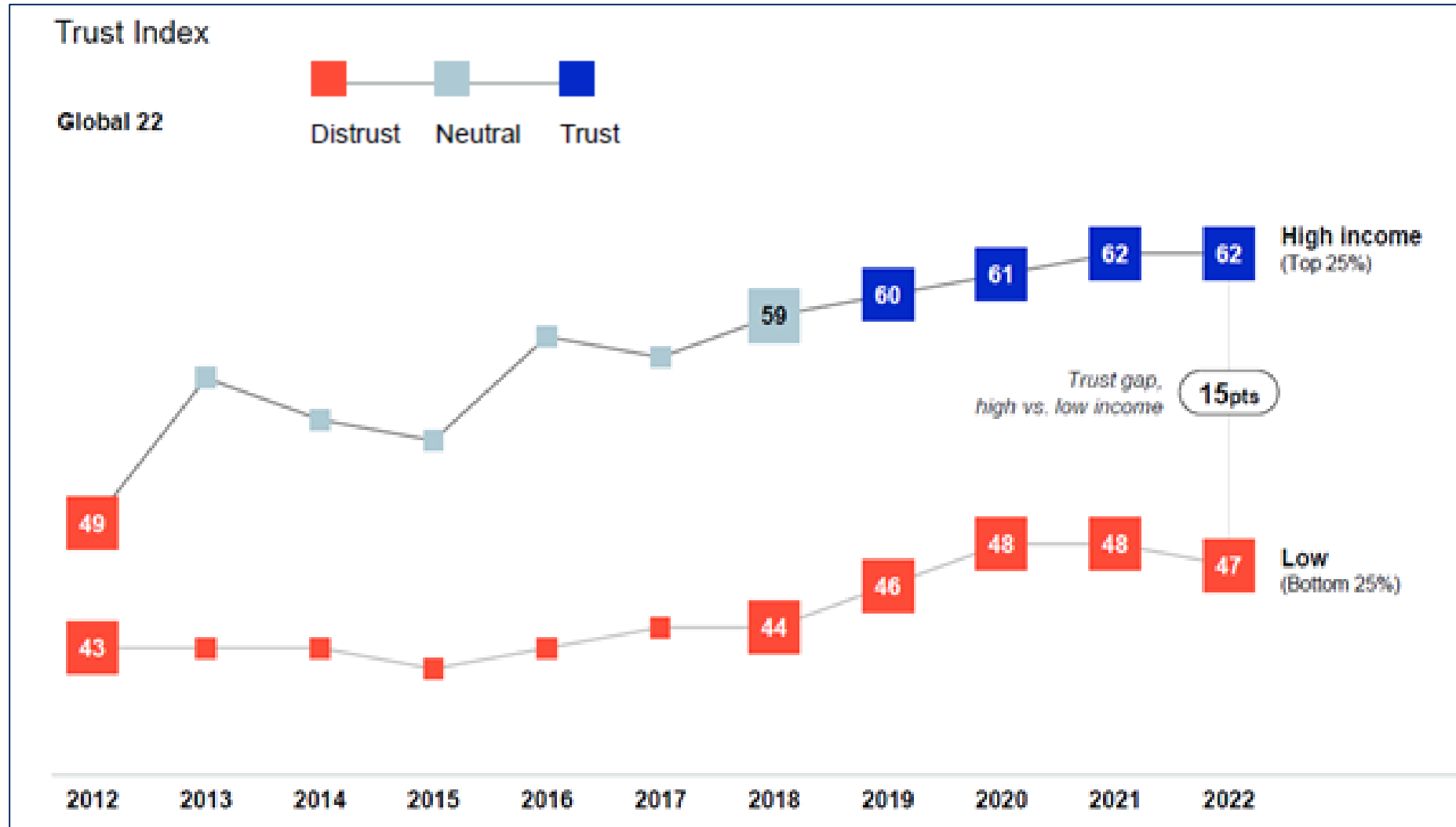
⁶ National Voices - Behind the Headlines: the unequal impact of the cost of living crisis – April 2022

⁷ Citizens Advice [cost of living data dashboard](#) August 2022

There is a record trust gap (of Government, business and media) between high and low income households



- Trust in Government and businesses 'to do the right thing' is much lower among low-income groups⁸
- Public don't think the government is taking the crisis seriously
- Mass public protest viewed as likely, with 61% believing people will have utilities cut off and 54% think people will refuse to pay bills and taxes⁹



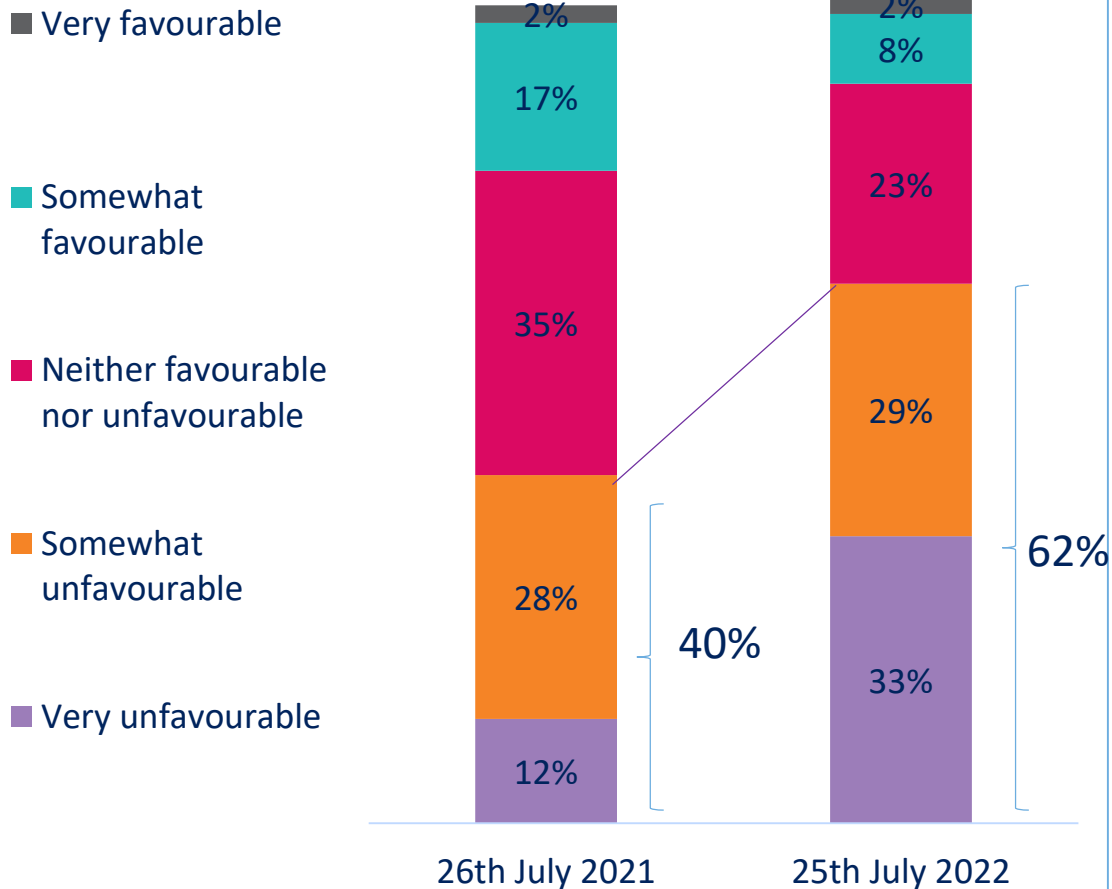
⁸Edelman Trust Barometer 2022: 36,000 respondents across 28 countries

⁹Public First – Insights into public attitudes towards the cost of living crisis – August 2022

And utility companies are also under the microscope



Public perception about utility companies



Water pollution

No river safe for bathing

● Toxins at highest levels since testing began ● Watchdog 'leaves water companies free to pollute'

TIMES INVESTIGATION

Ryan Watts, Rhys Blakely
George Greenwood, Dylan Lewis

Dangerous pollutants in England's waterways have reached their highest levels since modern testing began, The Times can reveal, with no river in the country now certified as safe for swimmers.

Wild swimming has surged in popularity, with tens of thousands of people bathing in countryside rivers and ponds during this week's heatwave.

However, an investigation by this newspaper has revealed that rivers in England are not tested enough to be

considered safe for swimming. Eighty-six per cent fall short of the EU's ecological standard — the minimum threshold for a healthy waterway — up from 75 per cent a decade ago.

In addition, half of all stretches of river monitored by the Environment Agency exceeded permitted limits of at least one hazardous pollutant last year, including toxic heavy metals and pesticides.

Despite serious pollution incidents frequently exceeding the limits, prosecutions by the agency against the regional monopolies that run Britain's sewage systems have declined — to three last year from thirty in 2014.

In some cases the agency is allowing the water companies to suggest their

own penalties, usually contributions to charity. Experts say that this leaves water companies feeling free to pollute rivers. Kerry McCarthy, MP, a member of the environmental select committee, said that the companies were 'treating fines as the cost of doing business, rather than seeing them as a serious deterrent', adding: 'The Environment Agency needs to step up.'

David Slater, a former director of the agency, said: 'Cutting budgets absolutely has an effect: fewer policemen means less testing and less enforcement — and as we've seen with some of the water companies, people will take advantage of lax enforcement.'

Last month Southern Water was fined

a record £12 million for 'shocking' breaches that allowed raw sewage to be released into rivers and on to beaches. Environmental groups are now calling for reform of the Environment Agency. Stuart Singleton-White, of the Angling Trust, said: 'We're going backwards — our rivers are getting worse.'

Hundreds of wild-swimming clubs have formed across the country in the past two years, according to the Outdoor Swimming Society, whose membership has climbed to more than 70,000 from only a couple of hundred a decade ago.

Most people who enjoyed waterside beauty spots last week will have been unaware of how Britain's ageing sewage

Continued on page 2, col 3



Families taking to the water during hot weather may have been unaware that

Millions of us won't be able to afford food and bills this winter.

We cannot afford to let that happen.

- We demand a reduction of bills to an affordable level.
- We will cancel our direct debits from Oct. 1 if we are ignored.
- The campaign starts now with your help.

Don't pay campaign

¹⁰YouGov Tracker - [How Brits feel about utility companies](#). 1931 - 2081 GB Adults per wave

A challenging and changing time...







- The energy price cap increased from 1 April for approximately 22 million customers. Those on default tariffs paying by direct debit saw an increase of £693 from £1,277 to £1,971 per year (difference due to rounding). Prepayment customers increased by £708 pa from £1,309 to £2,017.
- Energy bills were expected to hit £3,549 in October
- And £4,266 in January
- Liz Truss's recent statement has helped but there is still a challenge. The rise in energy prices is extremely worrying for many people with increasing numbers struggling to make ends meet, further rises are a cause for concern for many.

Families at risk

- Spiraling energy prices will turn the UK's cost-of-living crisis into a catastrophe as inflation continues to increase.
- Unlike tax rises, this squeeze will be felt most keenly by low-income families. As typical energy bills reach nearly £4,000 a year this means the poorest third of households spending more than 10% of family budgets on energy bills alone.
- The elderly are at risk and many will ration their energy use. Living in a cold home can worsen any health conditions.
- People with a health condition already have higher energy requirements.
- Customers on prepayment meters pay more per unit. Suppliers are already seeing greater numbers of self-disconnection (a term used when the customer can't afford to top up)
- Families with children under 5 – many are likely to face tough choices (eating or heating), children are vulnerable to developing health conditions living in cold damp homes.
 - Increased levels of self disconnection
 - Impact on mental health
 - Adverse affect on physical wellbeing
 - Choice between heating/eating/caring
 - Falling into unmanageable debt
 - Safety risk as customer behaviour changes, using alternative methods of heating/cooking in the home

What have we been doing to help people?



Partner	Investment	Project outcomes																																							
 Partner since 2019	£250,000	Last year 11,163 fuel poor customers were supported by our partners with 36,487 referrals, an average of 3.3 referral outcomes per individual, up from 2.07 in 2020/21. Provision of advice: <table border="1"> <thead> <tr> <th>Outcome</th> <th>Outputs</th> <th>Social value</th> </tr> </thead> <tbody> <tr> <td>Energy behavioural change</td> <td>9,393</td> <td>£138</td> </tr> <tr> <td>PSR discussion</td> <td>8,779</td> <td>£8</td> </tr> <tr> <td>Tariff supplier advice</td> <td>7,603</td> <td>£159</td> </tr> <tr> <td>Debt advice</td> <td>1,055</td> <td>£420</td> </tr> <tr> <td>Total referrals/ value</td> <td>26,830 (74%)</td> <td>£3.0m</td> </tr> </tbody> </table>	Outcome	Outputs	Social value	Energy behavioural change	9,393	£138	PSR discussion	8,779	£8	Tariff supplier advice	7,603	£159	Debt advice	1,055	£420	Total referrals/ value	26,830 (74%)	£3.0m																					
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 Partner since 2019	£35,000																																								
 Partner since 2018	£30,000	In addition, our partners made 3,044 referrals to other third parties, such as the Benefits Enquiry Line and Local Authorities.																																							

Stakeholder outcomes

- ✓ 22,223 fuel poor customers have been reached since 2017. This represents 10% of all fuel poor customers, exceeds our annual target and puts us on trajectory to reach 100% by 2028.
- ✓ 81% of fuel poor customers surveyed post-intervention reported improved mental wellbeing and 45% felt their physical health had improved after receiving advice.



Emergency credit vouchers to prevent self disconnection

Food vouchers when customers are off supply

Energy efficiency guidance
Save energy save money

Supported access to grant funding

Educating and engaging our youth on energy efficiency

Working with foodbanks to link food poverty with fuel poverty

Improvements since the winter storms



Automation

Fitting sensors to diagnose faults remotely so we can respond sooner

Fitting LV overhead line reclosers to automatically restore supplies at 250 sites by the end of ED1



Customer information

Upgrading NMS to allow more targeted information to customers on ETRs

New app allowing customers to report damage and NMS to automatically link this to live faults



Support to customers

Community resilience fund to help customers during and after major incidents

New dedicated incident roles for our leaders



Network improvements

Working with Government to upgrade existing resilience standards to harden networks against storms through a mix of undergrounding and enhanced tree clearance



- Increase fuel poverty support to reach our highest number of customers – target of 15,000
- Expand youth support from learnings and trials completed in FY21/22
- Increase collaboration between stakeholders to share information and grow referrals i.e. Age Concern and Lancashire Fire and Rescue, Citizens Advice and TBBT
- Expand promotion of advice through all communication channels; use of radio, online seminars, facebook live and social media platforms to broaden our customer reach.
- Build ED2 contracts to achieve the continued growth of fuel poverty and referral programmes to support customers
 - 50,000 customers per year receiving a mixture of support and interventions



Energyworks Green Doctors

Phil Treaton
Head of Neighbourhoods

October 2022



Groundwork Greater Manchester

Our Vision is to Create a Greener, More Resilient City Region with Stronger, Healthier Communities & Enhanced Prospects for all Local People.

We prioritise working in places and with people who need our support the most, creating a more just and fair society.

Our work focuses on three specific areas:

- > **Facilitating the power of communities**
- > **Delivering jobs & skills for a greener economy**
- > **Supporting young people to fulfil their potential**





GREEN
DOCTOR

Why come to Energyworks?

Some of the reasons people ask us for help are:

- Struggling to pay energy bills
- Finding it hard to manage fuel debt
- Worrying about keeping warm or choosing between eating and heating
- Looking to increase the energy efficiency of their home
- Feeling that their home is cold, damp or draughty
- Respiratory problems e.g. asthma or a persistent cough



Energyworks

- **Saving Money:** We show people that being green is not just good for the planet but also for the pocket. We focus on how to help individuals, households and communities save money and maximise their income.
- **Experienced advisors:** Our 'Green Doctors' and other trained staff know how to make the biggest cost savings and how to gently encourage behaviour change.
- **Practical action:** We don't just offer advice, we take practical action too, from fitting water conservation measures to helping people to fill in forms for grants or switch energy providers.
- **Expert at referrals:** We know that people struggling with their bills or living in cold, damp homes will be dealing with a wide range of issues from health conditions to loneliness. Our staff are trained to spot issues like these and refer people to the right local service.





GREEN
DOCTOR

Energyworks

Likely Outcomes

- Priority Service Register
- Warm Home Discount
- Referral for small measures (e.g. radiator-foils, LED light-bulbs, brushes, power-downs, dehumidifiers).
- Support with other vulnerability factors such as loneliness/social isolation (including digital), signposting to local Social Prescribers, Safe and Well Checks (Fire Service) and other agencies as appropriate.
- Customer support for Energy Providers incl. Debt Write Off
- Support to access funding for large measures e.g. central heating





GREEN
DOCTOR

Energyworks

- Capital works





GREEN
DOCTOR

Energyworks

“Before being contacted by Groundwork, I was without any heating or hot water, my Boiler had packed in, and I wasn’t sure on how I was going to get my boiler fixed. I spoke with [Green Doctor] who then referred me to another program, which helped me to get my Boiler replaced. I was very happy with the help I received, and that I now have heating and hot water. I was also very happy at how fast the Gas engineers fitted the Boiler.

I was also having issues with my energy supplier, got behind with payments but since speaking to [Green Doctor] I have been paying off my arrears

It has been very good to have the help they have provided to me, and also being able to get my boiler replaced has meant that I will now be warm within my home. This was a big concern for me previously.

I have managed to start paying off my arrears with [Energy Supplier] and will keep these payments up that I have been making, I have been paying off £50 a time, every time that I get paid. So I want to keep on top of this and get it cleared. Also with my supplier, they will be installing smart meters, I believe this will help me to keep on top of my bills and not get behind with any payments in the future”

James, aged 62



Energyworks

- Trends

Year	Household visits and Advice	Amount saved by switching energy suppliers	Households Applied for the Warm Home Discount	Emergency Fuel Vouchers Distributed
2019/20	1900	£47,290	No Data	£0
2020/21	1964	£12,691	578	£43,368
2021/22	3348	£4,594	629	£70,802



Roundtable discussion





- How do you think that the current cost of living crisis has influenced customer opinion on net zero?
- How do you think this could be leveraged to encourage an acceleration towards net zero goals?
- What fuel poverty support is already available that we should be making customers aware of?
- How can we work together to ensure awareness?



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Break

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Customer adoption of Low Carbon Technologies (LCT)

Steven Glasgow

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Regional insights

What we are hearing from customers nationally and within our region

Triangulation of strategic insight August 2022

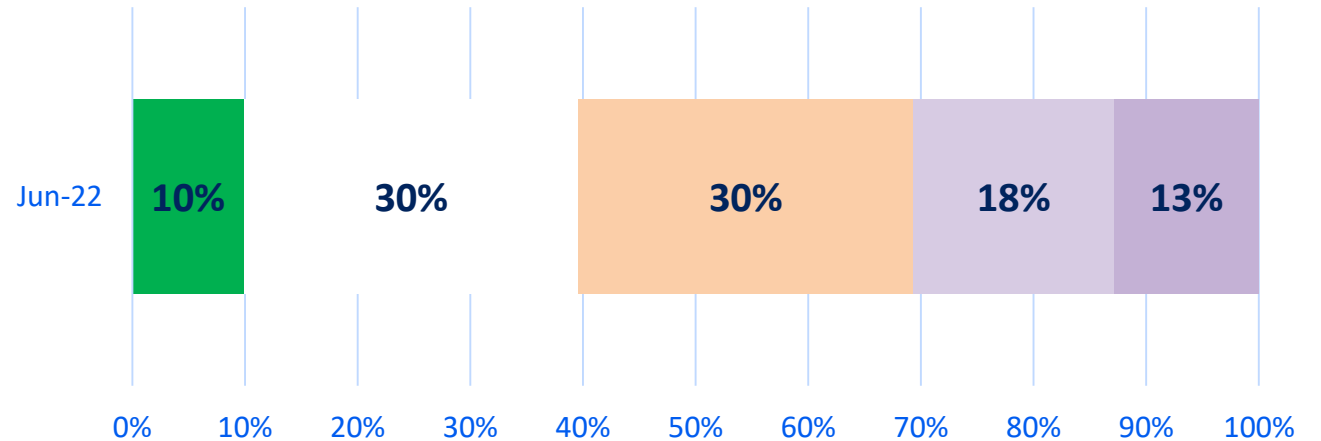


National concern about climate change is increasing, but only 40% of consumers feel they know a fair amount about net zero



- **83% of consumers are concerned about climate change¹¹.**
 - **Worries about climate change have increased following the recent heatwave¹².**
- **87% have heard of net zero, although only 9% state that they know a lot about net zero¹¹.**
- **2/5 of consumers know at least a ‘fair amount’ about ‘net zero’¹².**

Many governments and companies around the world, including in the UK, are committing to achieving ‘net zero’. Before today, how much, if anything, did you know about this concept?



	Jun-22
■ A lot	10%
■ A fair amount	30%
■ A little	30%
■ Hardly anything, but I've heard of it	18%
■ Hadn't heard about this before now	13%

¹¹ HM Government, Climate Change and Net Zero: Public Awareness and Perceptions, Research Paper No. 2021/034. Sample Size: 7,000 adults in GB

¹² [YouGov Survey Results](#): Sample Size: 1766 adults in GB Fieldwork: 19th - 20th July 2022

50% of North West consumers are looking, in the next 5 years, to install at least one form of LCT in their home



- ENWL forecasts indicate 630,000 electric vehicles are expected on the region's roads by 2028¹³
- Motivating factors include environmental reasons (38%) interest in new technology (31%) and operational cost savings (19%)¹⁴
- **BUT**, only 7% of all customers surveyed said they have **EVER** received information about LCTs¹⁵

¹³ Electricity North West [Distribution Future Electricity Scenarios 2021](#)

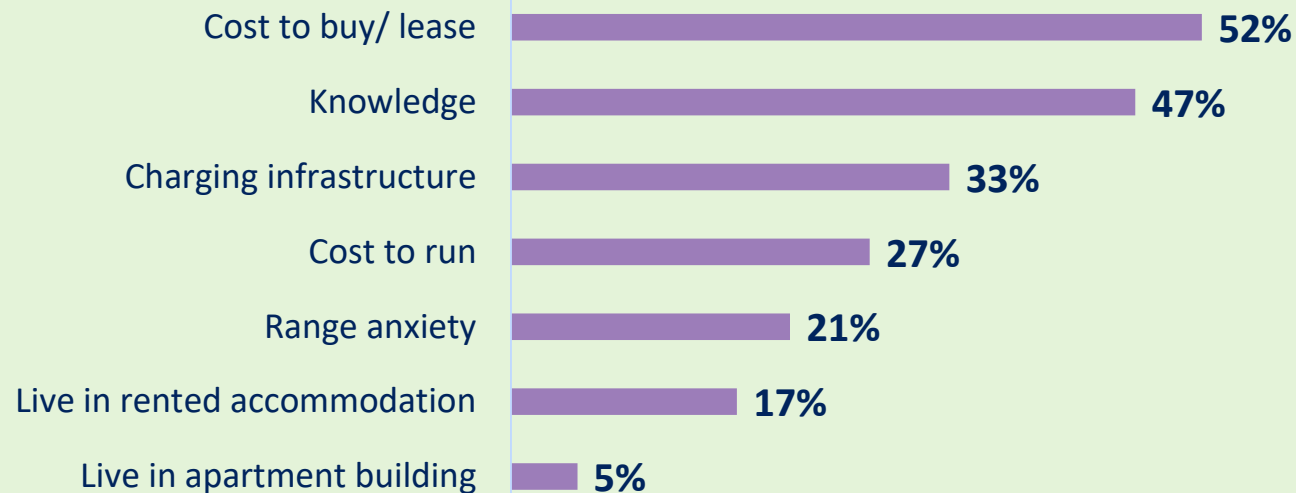
¹⁴ [Addressing the barriers to EV adoption | Geotab](#)

¹⁵ Electricity North West LCT research (2021): Representative north west sample n=211

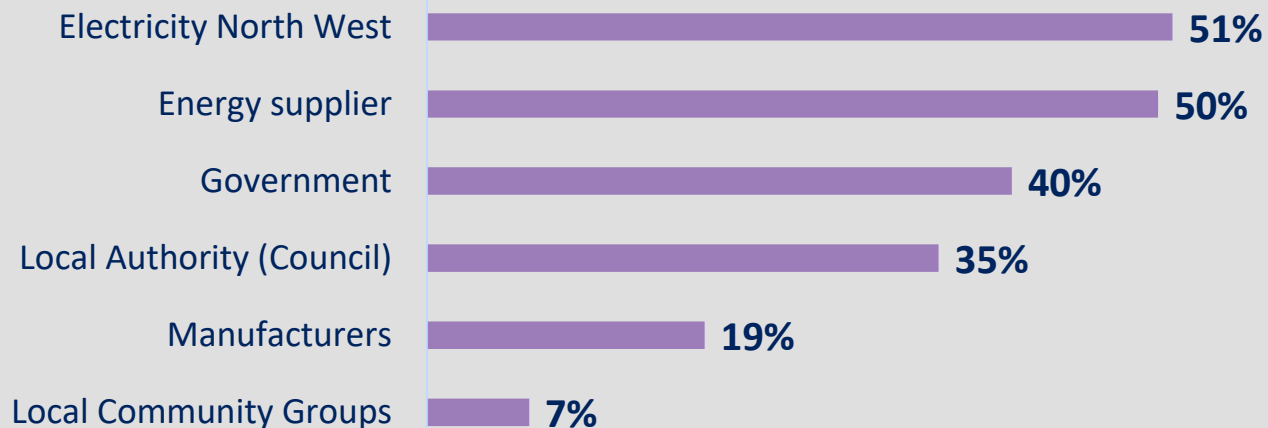
Consumers are looking to Electricity North West to fulfil a perceived gap of providing trusted impartial information



Barriers to adopting electric vehicles



Who is best to provide impartial information on LCTs?



Low income households feel disempowered, and are looking for leadership to mitigate the risk of being left behind



- For older customers particularly there is a sense of guilt in terms of what is being left as a legacy by their generation.
- A disconnect exists between climate change concern and personal action:
 - ❑ Focus on immediate household issues: job security; kids; surviving
 - ❑ Experience of how long things like recycling take to get mass involvement
 - ❑ Personal additional costs involved in acting early – ruled out by escalating cost of living and energy crisis



FIRST MOVER: “This has to be a collective effort – it affects us all but who starts it and how long will it take?”



NO CLEAR LEADERSHIP: “Who is taking the lead on this thing – is it the Government?”



COST OF ACTION IS HIGH: “It’s all very well this talk about electric cars and heat thingy’s but I cant afford them in the first place”



EXCLUDED DUE TO HOUSING: “Most of these new technologies are for new housing but I live in a terrace so where do I plug my car in and how do I get wall insulation”

As well as providing information, consumers want us to futureproof by removing network barriers

83% support from customers for our investment proposal

‘Unloop’ shared services (multiple properties using the same cables) where necessary to ensure that customers are not prevented from embracing low carbon technologies, such as electric vehicles.

A looped service is where one or more customers are connected to the electricity main with the same service cable, which limits the amount of additional devices that can be connected. Adding new technologies such as electric vehicle chargers can overload the service if they’re all used at the same time.

We will identify where this is a potential issue and proactively unloop the service to 32,000 properties.

BENEFIT: Enabling customers to embrace new technologies such as electric vehicles.

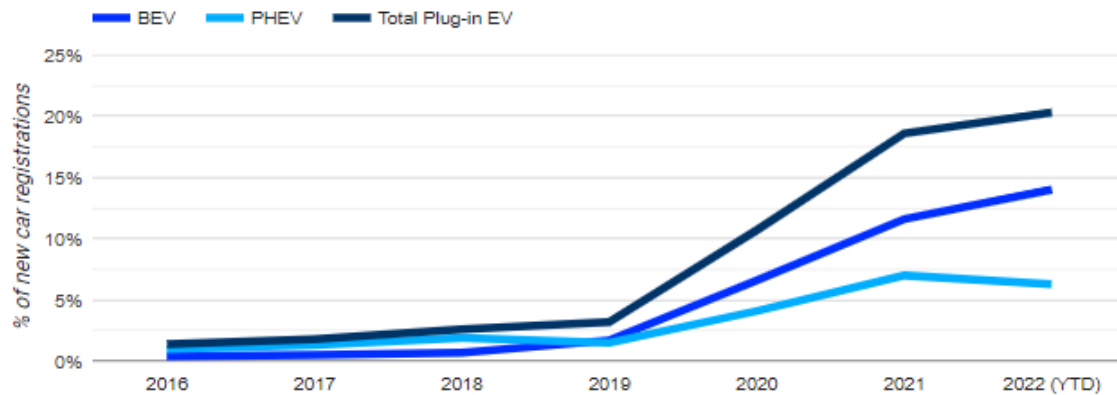


What we seeing at the moment?



Domestic deployment of EV charge points, heat pumps and solar panels

Annual market share – plug-in market share of new car registrations (2016 to date)



Source: SMMT, August 2022



<https://www.zap-map.com>

Region	Number of BEVs registered - 2020	Number of BEVs registered - 2021	% Increase in BEVs
North West	7,005	21,993	214.0%
South West	11,554	27,964	142.0%
Yorkshire & the Humber	6,304	14,639	132.2%
South East	22,453	51,205	128.1%
Scotland	7,529	14,808	96.7%
East	11,152	21,038	88.6%
Northern Ireland	1,390	2,549	83.4%
East Midlands	5,793	10,047	73.4%
Wales	2,696	4,641	72.1%
London	14,735	24,908	69.0%
North East	2,323	3,574	53.9%
West Midlands	11,628	16,888	45.2%



*LeaseLoco analysed data on BEV (Battery Electric Vehicle) registrations, by region, obtained in July 2021 through a Freedom of Information request to the DVLA.

What else are we seeing at the moment?



Applications for low voltage generation have increased exponentially in the last 2 years

Increase in applications for large scale solar (30-50MW) and batteries (70-200MW)

Domestic deployment of EV charge points & heat pumps

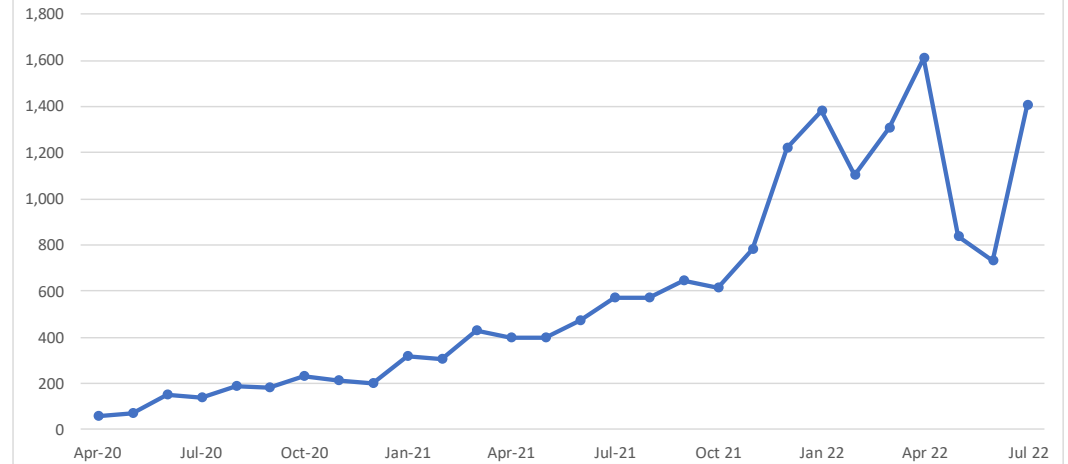


Volumes have grown significantly, with a strong bias towards EV charge points

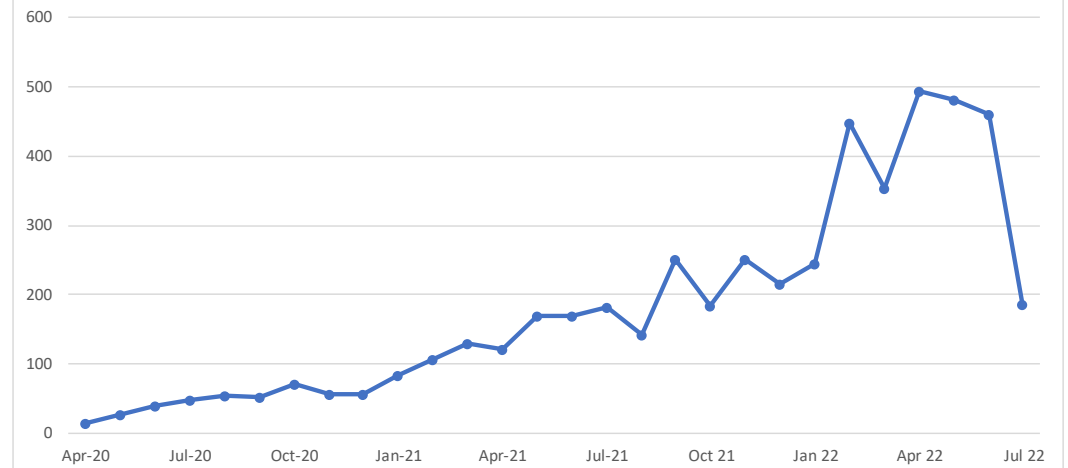
60% were approved; the remainder require an upgrade to the existing electricity supply to ensure it remains safe & reliable

30% required the customer and their neighbour to be provided with dedicated service cables given looped properties

Application Volumes



Intervention Volumes



What have we done so far?



Funding

For existing domestic properties, where an upgrade to the existing electricity supply is needed; this is funded from allowances and not by the individual customer



Approvals

A further assessment is now done to understand whether the LCT installation can go ahead in association with load management as a temporary arrangement whilst we complete the work



Support to customers

Dedicated team established to manage this work stream, 30 FTE increase over the last 12 months
Enhanced site surveys



Digitisation

Working with the ENA to digitalise the notification and application processes

The challenges that we are experiencing...



Customer awareness of potential DNO involvement

Affected 3rd parties

Sign-off of works at site survey

Requirement to access service cables under driveways

Internal works

Reinstatement expectations

Time to complete work

Installations with no notification to DNO

Notifications that should have been an application

What are we working towards for ED2?



Build customer awareness

Digitisation and automation of the application process to simplify, to resolve data integrity and to manage response times given expected growth

Evolve customer journey based on feedback and learnings from the challenges experienced

Development of engineering solutions and increased use of technology to minimise customer disruption

Manage the growth to ensure we are operating at the correct resource levels

Tender a contract to have a dedicated delivery partner reflecting specialism of works and expected growth

Roundtable discussion





Even though we are seeing a massive uptake, we know people are still not engaged and are at risk of being left behind; so we would like to know what your views are...

- Did you know you had to tell us about a EV / HP / PV installation or your installer has to?
- If you've had an installation...
 - How hard or easy was it?
 - What would make a difference to the service to be easy?
- If you haven't...
 - What is stopping you?
 - What are your concerns and questions?



Q&A



electricity
north west

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Your feedback





How to access mentimeter:

- Open your web browser
- Head to www.menti.com
- Use the code **85085186** to access polling (this is a different code to earlier poll)
- Please answer the five feedback questions to help us improve





Your feedback: We want to hear your views on this event, so we can make it better for you next year.

1. Overall how **satisfied** were you with today's event?
2. Which **topic** did you find **most interesting**?
3. What **topics** would you like us to cover at future events?
4. When planning future events like this, **what should we improve**?
5. Where did you **hear** about the event?

Menti.com

Code: 85085186



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Thank you

Stay connected...



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