Jemena Gas Networks (NSW) Ltd

2020-25 Access Arrangement Proposal

Attachment 2.1

Overview of our community and stakeholder engagement program

Jemena
bringing energy to life

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Abbreviations

AER	Australian Energy Regulator
ATA	Alternative Technology Association
CALD	Culturally and Linguistically Diverse
CD	Chargeable Demand
COTA	Council of the Ageing
ECA	Energy Consumers Australia
ECC	Ethnic Communities Council
ECCNSW	Ethnic Communities Council (NSW)
ENA	Energy Networks Australia
EUAA	Energy Users Association of Australia
EWON	Energy & Water Ombudsman - NSW
IAP2	International Association of Public Participation
JGN	Jemena Gas Networks (NSW) Ltd
LPG	Liquid Petroleum Gas
NSWBC	NSW Business Chamber
PIAC	Public Interest Advocacy Centre
UDIA	Urban Development Institute of Australia

1. Overview of our community and stakeholder engagement program

Jemena's vision is '*To be customers' first choice for world leading, sustainable and reliable energy.'* We therefore continuously work with customers to understand and meet their changing energy needs. Putting the customer at the heart of everything we do is part of our DNA. Our objective is that customers will advocate for us based on the experience they have of our products and services. To drive this through the organisation we have established 'Customer Focus' as one of our five company values and through this we commit to '*consider our customers in everything we do'*.

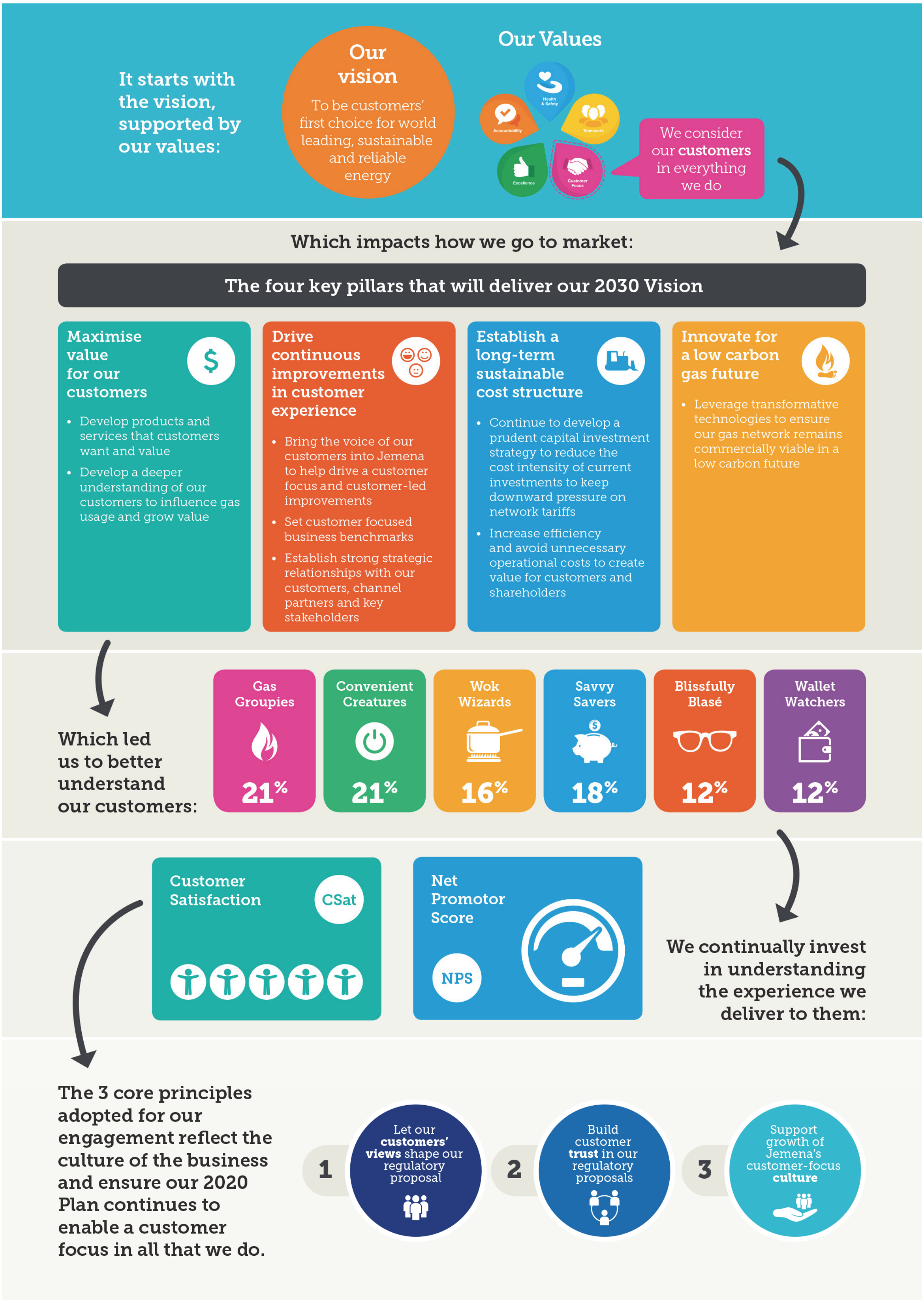
This has led us to embark on research and measurement programs which seek to better understand our customers (e.g. segmentation research), to understand how customers perceive their experience with Jemena Gas Networks (NSW) Ltd (**JGN**), and how we can improve that (e.g. customer satisfaction surveys).

Developing our 2020 Plan has presented a unique opportunity to expand the work we do with our customers and to allow them to shape the gas services that we provide over the short and long term. Taking a customer-led approach to the development of the 2020 Plan was a natural progression of our day to day work.

The way our values and beliefs as an organisation influenced our approach to engagement and the development of our 2020 Plan is highlighted overleaf in Figure 1-1.

Arabic speaking customers

Figure 1-1 Our Customer story

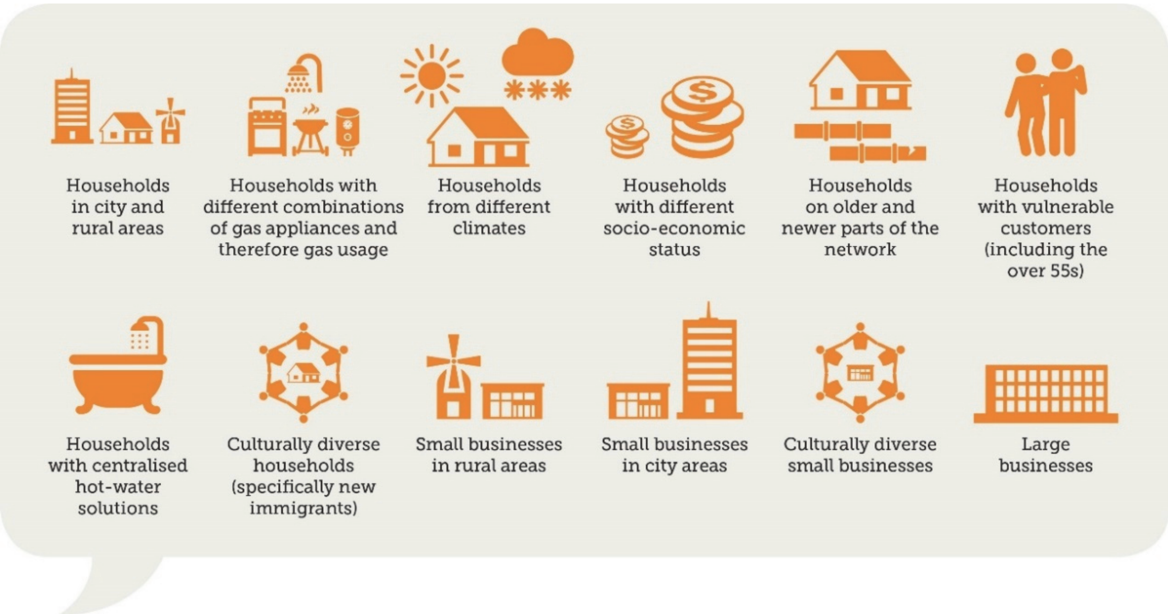


Through our extensive customer segmentation research we understand that every customer is different and their needs and experiences is unique. Through our ongoing business engagement and research we have recognised the diverse range of customers we have, from people in inner-city apartments who use gas to cook their food to householders in cooler climates using gas to keep warm. Gas also plays a significant role in the operation of businesses of all sizes, from shops and offices all the way through to large industrials.

Reflecting this diversity in our engagement for the 2020 Plan was critical to its authenticity and in ensuring the results were truly representative and therefore implementable.

In preparing our 2020 Plan we engaged with a wide range of customers and have tried to ensure our engagement captured the views from across the communities we serve. We did this through recruiting diverse customers for focus groups and forums and specifically engaged with hard-to-reach communities in sessions tailored to meet their needs. Figure 1-2 shows the customer groups that we identified for face-to-face consultation. While this is an extensive list, given the broad diversity of our customer base, it has not been possible to talk to all customers. We therefore supplemented our face-to-face engagement with a website—yournetwork.jemena.com.au—and promoted it via social media with the aim of seeking inputs from as many customers as possible. Through this, we have shared the opportunity to engage with 4,700 customers, 293 of whom actively shared their views with us. As well as directly seeking the views of customers, we also sought the views of gas retailers and stakeholders such as customer advocates.

Figure 1-2 Customer groups identified for face-to-face consultation



To understand the needs of our diverse 1.4 million customer base we conducted an engagement program that took us across NSW to conduct in-depth and deliberative consultations with customers. This process culminated with us bringing together a sub-set of customers to provide feedback on our Draft 2020 Plan and put us in a position where we can confidently state that our 2020 Plan is in the long-term interests of our customers. Our engagement journey is described overleaf.

We have learnt a lot from all of the customers we have engaged with. They told us that they enjoy the benefits of gas cooking and heating, specifically the controllable and instantaneous nature of gas. Overall they believe gas is value for money but they are concerned about increasing gas prices, specifically for those on lower incomes and those least able to pay. They told us that they want to continue to use gas as they do today. From the discussions, four key themes emerged: affordability, a safe and reliable gas service, fairness, and innovating and planning for the future.[1]

[1] These four key themes, together with how we are responding to customer feedback on these themes, is contained within the 'Short on time' section of our 2020 Plan.


Our customer engagement journey
Customer Engagement in Numbers
4,900 visitors to JGN website yournetwork.jemena.com.au
63 Jemena facilitators
169 Hours of engagement
333 JGN customers engaged
293 Online surveys completed
8 Locations across NSW
43 Engagement sessions held
4 Board members who attended
SEP 17
Customer Council Meetings – Sydney
Understand and shape the engagement
NOV 17
Large customers – Sydney
Customer Forum
Household segments – Wollongong
Low-income study circles
Household – Dubbo, Sydney
Deliberative forums
Dubbo
Average income: $1,096/week
Average bill: $576
Jemena NG arrived: 1997
MAR 18
Customer Council Meetings – Sydney
Test engagement plans
Retailer workshops – Melbourne
APR 18
Customer Council Meetings – Sydney
Network Tour
Large customers – Sydney
Data workshops
MAY 18
Household segments – Sydney
Urban small and medium business forum
JUN 18
Customer Council Meetings – Sydney
Testing price and service options
Household segments – Sydney
Elderly customers study circles
Small and medium enterprise – Sydney
Culturally and linguistically diverse interviews
Newcastle
Average income: $1,165/week
Average bill: $405
Jemena NG arrived: 1984
Griffith
Average income: $1,065/week
Average bill: $750
Jemena NG arrived: 1993
Bathurst
Average income: $1,029/week
Average bill: $1033
Jemena NG arrived: 1986
AUG 18
Small and medium enterprise – Sydney, Griffith
Urban/regional small and medium business forum
Household segments – Sydney
Elderly forum
Goulburn
Average income: $981/week
Average bill: $959
Jemena NG arrived: 1980
Sydney
Average income: Varied
Average bill: $520
Jemena NG arrived: 1976
MAY – SEP 18
Household – Goulburn, Newcastle, Griffith, Bathurst, Western Sydney
Deliberative forums
SEP 18
Household segments – Sydney
Culturally and linguistically diverse focus groups
OCT 18
Customer Council Meetings – Sydney
Engagement results
NOV 18
Large customers – Sydney
Customer forum
FEB 19
Large customers, Webinar
Draft 2020 Plan explained
MAR 19
Combined Residential Forum, Sydney
Reconvened for feedback on Draft 2020 Plan
CALD Session, Sydney
Updated engagement results
MAY 19
Customer Council Meeting, Sydney
Updated engagement results
Wollongong
NG = natural gas

Customer and stakeholder engagement attachments

Table 1–1: Customer and stakeholder engagement attachments

Attachment	Name	Author
2.1	Overview of our customer and stakeholder engagement program	JGN
2.2	JGN's customer engagement program – combined reports	RPS (previously Straight Talk)
	Report 1 Customer Engagement – Jemena Gas Networks: detailing the methodology and findings from the initial phase of engagement that sought to understand how customers wanted to be engaged and their preferred content. Included in pages 03-118 of Attachment 2.2	
	Report 2 Jemena Customer Engagement Report: sets out the methodology and findings of the range of engagement activities conducted across all customer groups. Included in pages 119-210 of Attachment 2.2	
	Report 3 Jemena Deliberative Forum Summaries mid-program summaries: details the findings from the deliberative forums that formed the heart of the customer engagement process. Included in pages 211-250 of Attachment 2.2	
	Report 4 Jemena Large Customer Forum Combined Results: details the engagement conducted with Large Gas Users and Retailers. Included in pages 251-285 of Attachment 2.2	
	Report 5 Draft 2020 Plan Consultation Report: details the methodology and findings from our final engagement conducted post the publishing of our Draft Plan, the engagement sought to understand customer views on the plan. Included in pages 286-353 of Attachment 2.2	
2.3	Engagement materials: a sample of the handouts, activity guides and run sheets used throughout the engagement process.	RPS
2.4	Register of engagement activities	JGN

2. Engagement strategy

In designing the engagement program for our 2020 Plan we proposed three key objectives to our Customer Council. These objectives were agreed and established on 28 November 2017.

Figure 2-1 Key engagement objectives

1. To achieve our first objective and allow customers to shape our 2020 Plan in a meaningful way, we recognised that we would need to do more than simply *consult*. We needed to *involve* and, where possible, *collaborate* with our customers. This required us to start our process sufficiently early to give customers time and space to interrogate and debate the key issues and challenge our thinking on significant strategic decisions.

We would also need to identify areas of the plan where we could implement customers' preferences, for example the approach we took to our capital investment strategy and the price path. We then discussed with customers a range of factors that could influence their preferences and provided time and resources for them to build their capacity to debate and come to a collective decision.

Finally, we sought customers feedback on how we had applied their preferences in the Draft 2020 Plan and re-tested areas where we had balanced conflicting priorities and the differing views from across the customer base.

2. To ensure our engagement process lead to a 2020 Plan that our customers support, we endeavoured to ensure that the information we presented to them was as unbiased as possible. In other words, customers have heard the full range of opinions on the subjects and issues we discussed with them, and they have had all the information available to allow them to make informed decisions—for example, we showed them the collective and individual bill impacts of different scenarios, in the short and longer term, in a format that was easy to comprehend. We also prioritised discussions where collaboration was possible.

We have been transparent in sharing with customers where we have applied their feedback and where we have struck a balance between differing views. We have also shared with customers the impacts on the bill of decisions outside of their influence.

While we provided summary documentation of our Draft 2020 Plan to customers, we also we shared the full version to ensure transparency and provide customers with the opportunity to question and interrogate any aspect of the Plan.

3. Finally, members of the Jemena team from disciplines as diverse as customer service and engineering, from support staff to Board members and our Executive Leadership team (including our Managing Director and Chairman of the Board), participated in our engagement process. This allowed us to share the outcomes and views from customers more broadly throughout our organisation, and for our staff to feel a sense of ownership of the outcomes, which will mean they are better able to apply them in their day-to-day work. This has complemented our ongoing customer research programs—such as segmentation, customer satisfaction and customer experience / voice of the customer.

This extended to Arabic speaking staff supporting our Culturally and Linguistically Diverse (**CALD**) engagement—because one of our core values is Customer Focus, many staff had participation in engagement incorporated into their performance objectives, ensuring a real commitment internally to the program and ensuring the positive impacts of customer engagement were spread across the organisation.

Jemena staff discuss Fairness with customers

3. How we developed our community engagement program

We started phase one our engagement program for our 2020 Plan in 2017, working with a range of customers with two key questions:

- What topics or issues are important to customers?
- How do communities want to engage?

We spoke to rural customers in Dubbo and city customers in North Sydney in two concurrent deliberative forums, to low income customers in Wollongong in a series of three study circles, and to large business customers in a forum held in Sydney.

As well as engaging with our customers directly we also referenced a number of sources to help shape our engagement plans:

- We involved customers in reviewing materials to ensure they were customer-friendly and fit-for-purpose.
- Customer advocates were consulted through our Customer Council at key moments as we developed the program, including a secure Customer Council page on the yournetwork.jemena.com.au website.
- We drew on the ongoing customer research we conduct, specifically segmentation research to understand the divergent needs and experiences of our customers to ensure we consulted with all the various communities.
- We worked with engagement specialists RPS (formerly StraightTalk) to help us determine best practice for our unique circumstances.
- We reviewed our engagement program from our 2015 Plan to understand what lessons we could learn.
- We also reviewed other organisations' engagement to see what best practice methods we could adopt.

Our response to customer feedback from our planning phase is shown in the following table.

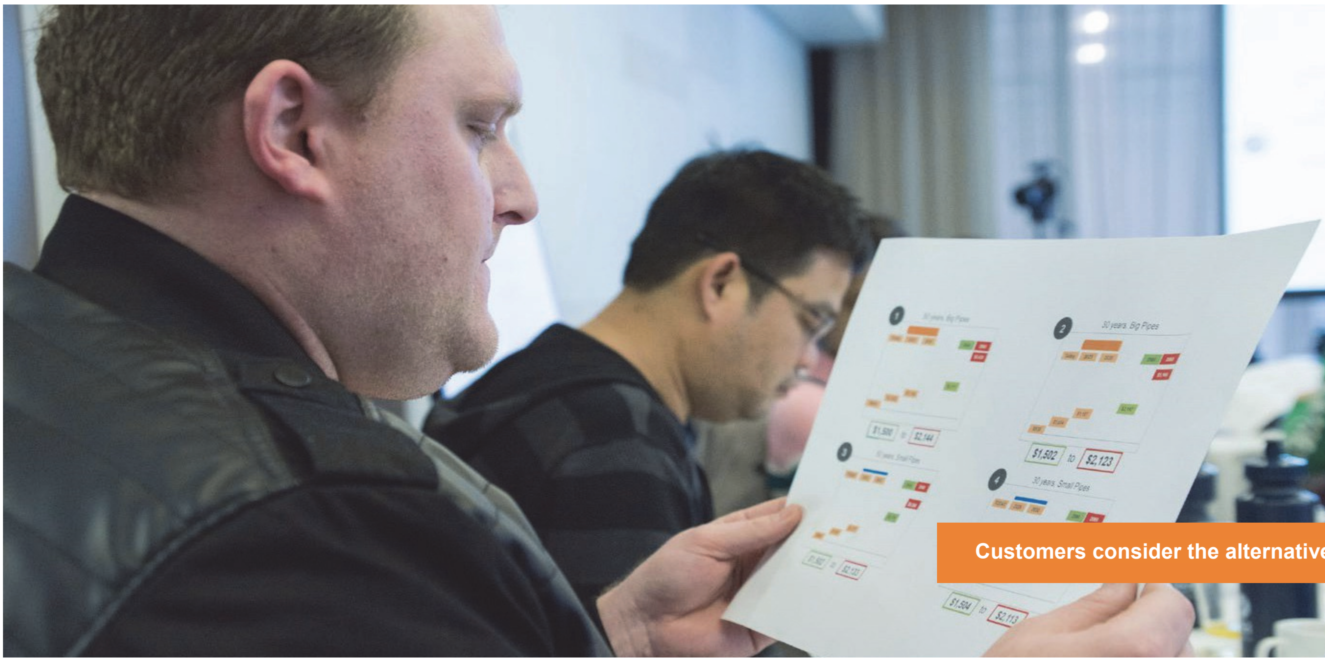
Table 3–1: Our reports to customer feedback from our planning phase

What customers said	How we responded
Gas is a significant cost of living pressure for households.	• We have engaged with representatives from all key groups to understand the impact of the prices we charge. • We have explored pricing alternatives to understand the impact on customers. • We have investigated ways in which the overall cost of gas can be managed. • We asked specifically about cost of living pressures, bill shock and price path.
Documentation should be short, concise, free of jargon, and should clearly spell out the benefits for customers.	We reviewed key documents with customer focus groups, to ensure they were customer-friendly and genuinely helpful.
Customers want visibility and transparency, they don't want the scope of consultation dictated to them or restricted	We chose to engage over a long time period using multiple (deliberative) sessions, to build customers knowledge and therefore capacity to engage on even the most complex topics – a technique used successfully in a variety of complex process (Dr Lyn Carson (2018), Concerns about Citizens Abilities, newDemocracy Foundation).

What customers said	How we responded
	We shared views on topics from across the industry even when they were very different to our own. We decided to engage a subset of forum customers mid-way through our engagement program, to help shape our third round of forums and ensure we focused on the right areas.
Regional areas can feel isolated and it is important to make sure regional areas are not forgotten.	We extended our consultation to more regional centres, to ensure these groups were fully considered. We have ensured our engagement is open to all customers by making it easily accessible on the internet and promoting its availability through Facebook campaigns.
Information about the energy industry and how to manage energy costs is difficult to find and understand. There should be more transparency, particularly on bills.	We held a session on understanding bills to address this need. We are working with other parties in the energy industry through the Energy Charter to make the industry more transparent and easier for customers to understand.
Trust in the energy industry is low, and we want to hear from other parts of the supply chain.	We invited other parts of the energy industry into our consultations to ensure customers received a broad range of views from across the industry.
Issues of security of supply and being a good corporate citizen are important	We have actively progressed our investigations into how greener gases like hydrogen and bio-gas could be transported around the network.

The work we conducted in 2017 was crucial to the development and success of our 2018 and 2019 engagement plans. It led us to spreading engagement over a long time-frame, having multiple sessions with the same groups to build their capacity over time, to create space for discussion and debate rather than focusing on presentations and to ensure the focus of every session was the customers themselves. It challenged us to move our engagement from consulting to involving and where possible collaborating with customers, and creating a process that allowed us to utilise a variety of techniques on the International Association of Public Participation (**IAP2**) spectrum where appropriate. It also allowed us to share these learnings with our Customer Council and involve them in the shaping of plans through a consultative session facilitated by our engagement partners RPS in November 2017.

The engagement process would need to solicit from customers the information required to draft a plan that's objective was to be in the long-term interests of customers and to build the capacity of customers so that they could confidently and capably judge whether or not the Draft 2020 Plan was in their long-term interests.



Customers consider the alternatives

4. How we have engaged

Our second phase of engagement began in March 2018 and ran through to November 2018. The purpose of this phase was to work with customers to shape our Draft 2020 Plan. Following the publishing of the plan in January 2019 we ran a third round of engagement to understand whether or not customers believed we had captured and reflected their views accurately and whether or not they believed the plan was in the long-term interests of customers.

4.1 Residential customers

To enable us to tailor our engagement we split residential customers into three main groups: general households, vulnerable and over 55 customers, and customers from culturally and linguistically diverse backgrounds. We tailored the engagement approach for each of these groups to help make the process as suitable and successful as possible.

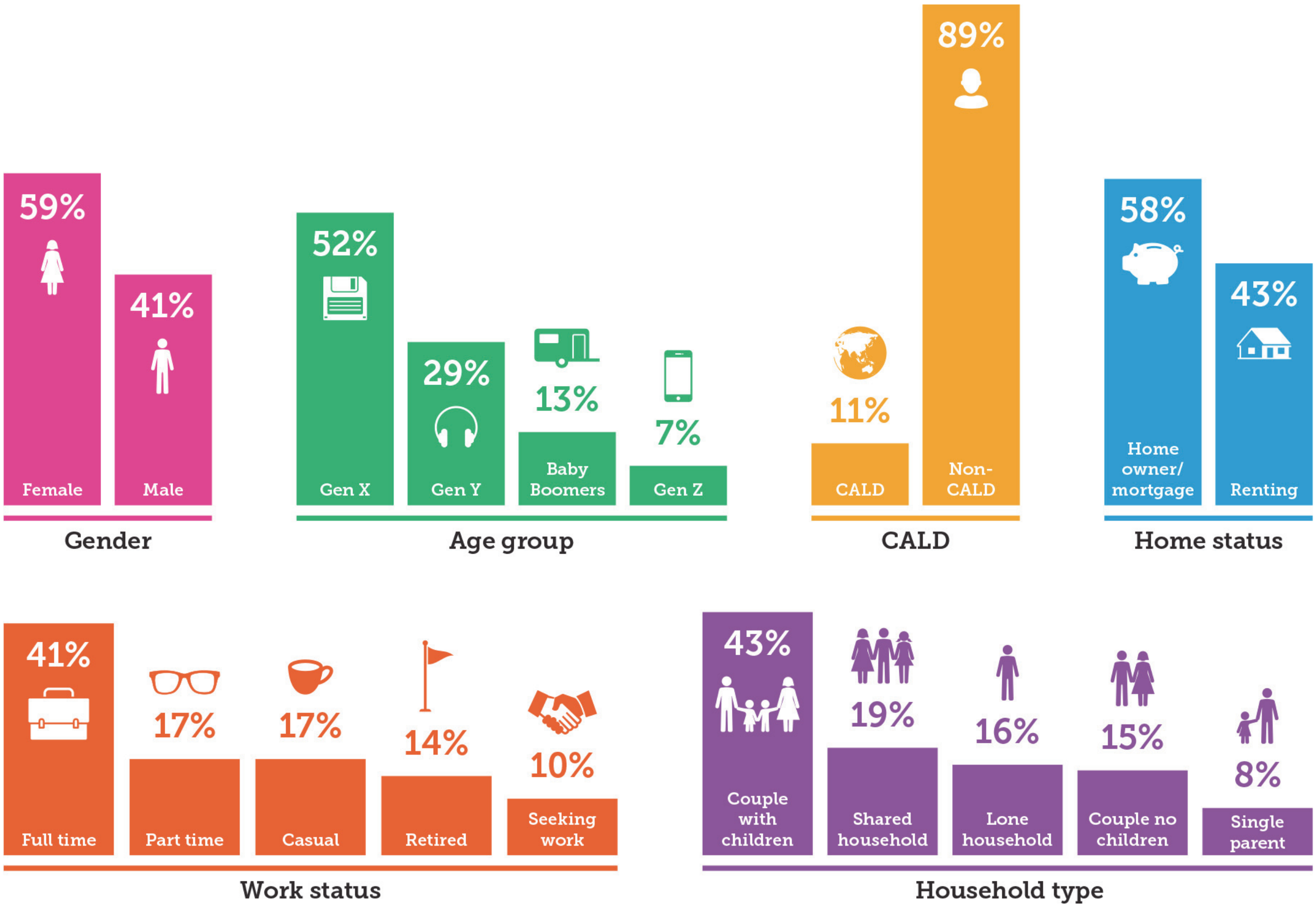
For general households we recruited groups of 13-25 customers in five cities across NSW. These cities (Bathurst, Goulburn, Griffith, Newcastle and Western Sydney) were chosen to ensure we captured a range of different gas usage and bill profiles, incomes and climate factors that represented the diversity of our customers and their experiences with gas.

Once the cities were selected, we then randomly recruited customers who represented the range of demographics within each community. Each group met three times, spending over 20 hours together in three full-day sessions. At each location, the same structure was followed:

- **Forum 1** – Introduction and orientation to the gas industry and JGN, understanding initial customer preferences and exploring differences.
- **Forum 2** – Exploring issues that affect the gas network such as net-zero carbon policies, the costs of maintaining or growing the gas network, and understanding different perspectives of those in the room and other external parties.
- **Forum 3** – Exploring different options and the impacts—in terms of service and bills—in the short and long term, and deliberating on the best outcomes for their communities.

Customers and staff at Bathurst

Figure 4–1: The demographic split of the general household forums



Source: Report 3 Jemena Deliberative Forum Summaries mid-program summaries, RPS (included in Attachment 2.2)

Once the Draft 2020 Plan was published we re-convened a group of 32 customers (from a pool of 69 who expressed their interest to take part), with representatives from across the five cities. The aim of the final session was to understand whether or not we had applied customers' feedback correctly and to refine our understanding of their preferences. Specifically we wanted to answer the question 'Is JGN's Draft 2020 Plan in customers' long-term interests'?

The structure of forum 4 was as follows:

- **Forum 4** – Overview of key elements of Draft 2020 Plan to understand whether we had correctly understood and applied feedback from our customers. Additional customers views on some of our capital projects, customer voting on where the Draft 2020 Plan is in their long-term interests.

For the low income/over-55 group of customers, we held shorter sessions but kept to the principle of deliberation. We held two in Western Sydney following the same basic structure as Forums 1 and 2 above, but selected topics and activities that were of interest to this group and were less complex and therefore suitable for the shorter time frame.

Through this process, we identified that a section of the over-55 community were not represented in the forums. They were customers who lived in retirement villages, and specifically those with centralised hot water systems. We therefore held a third group at a retirement village in Kirrawee—with residents from two similar retirement complexes—to understand their experiences of using gas.

Our final group was representative of a CALD community. We decided to explicitly target migrant communities who had been in Australia for between three and six years, to understand their journey and their unique perspectives on gas.

We worked with the Ethnic Communities Council (**ECC**) to identify an Arabic community in Fairfield and to facilitate three forums in Arabic.

Again, we utilised the structure from Forums 1 and 2, which we adapted to cater for the needs of the customers and the shorter timeframe we had for each Forum. Finally we met them again after the Draft 2020 Plan was published to ensure we had correctly captured their views, and to understand their perspective on the key question of whether or not the 2020 Plan is in their long-term interests.

All of these forums and study circles were supported by JGN staff, with an emphasis on attendance from subject matter experts and the Jemena Executive Leadership Team, as well as our Board members and industry stakeholders. Specifically the Australian Energy Regulator (**AER**), the Public Interest Advocacy Centre (**PIAC**), St Vincent de Paul's, Energy Consumers Australia (**ECA**), Energy Networks Australia (**ENA**), the Alternative Technology Association (**ATA**) and the ECC attended and/or provided content for our engagement.

Arabic staff lend a hand

4.2 Small Business customers

We identified three groups of small business customers, rural customers, city customers and CALD customers. As these customers are time poor a deliberative approach was not possible, and therefore we amended our approach.

We began by conducting a focus group with small businesses in Sydney. This methodology had some issues as customers were not able to ask questions and seek information, similarly the customers were free to discuss issues they felt were important which were not all related to JGN and as such the conversation offered limited insight for our 2020 Plan development process. This group also had some recruitment issues with some customers in the group which had LPG rather than mains gas.

We therefore amended the format for the rural customer group which we met in Griffith. The new format was a forum where JGN staff were present and able to engage in a consultative way. This format and recruitment was much more successful and overcame the issues experienced in Sydney.

Thirdly we engaged again with the ECC to conduct in-language interviews with a range of small business owners in the restaurant and hospitality area. 23 interviews were conducted in Arabic, Hindi, Cantonese and Mandarin.

MD Frank Tudor engaging with large gas users

4.3 Large customers

While large businesses consume 55% of the gas that flows through our network, they make up only 0.03% of our customers. Most large users are extremely knowledgeable and very clear on what they need from the gas network in NSW.

At our annual large customer forum in 2017, our large customers told us that they wanted us to engage with them during the development of our 2020 Plan, to ensure there were no surprises. As they were time poor, they stated a preference for one-on-one discussions, and for these to take place during regular business-as-usual meetings with JGN, and at the next large customer forum.

One exception to this rule was access to data. Large customers raised this in the forum we held in 2017 as an issue they wanted us to address as a priority. In response we formed a working group with a selection of key customers to design a solution that would meet their needs. During this investigation it became clear that this was not a 2020 Plan issue and could be address in a shorter timeframe, and therefore we have progressed with a pilot project to trial a solution.

As we went through the process of developing our Draft 2020 Plan, we engaged with large users about their likely future demand requirements, our plans to allow them to reset their Chargeable Demand (**CD**)— most of our large business customers are charged based on the level of capacity they require—and our tariffs.

We had direct conversations with a number of customers in the following industries:

- Transport
- Education
- Property development
- Food manufacturing
- Power generation
- Energy Consultants
- Hotels
- Building materials manufacturing

Details of the organisations we spoke to are available in Attachment 2.4 JGN Engagement Registry.

During our discussions, we covered a range of topics:

- 2020 Draft Plan and prices.
- Affordability, reliability and gas supply, opportunities and challenges.
- Data access.
- Hydrogen and the future of gas network.

At our 2018 annual large-customer forum we sought customers' views on balancing price, reliability and the environment, short term versus long-term trade-offs, their thoughts on the impact of a zero carbon future and how they prefer our price to change from year-to-year to provide our total 5-year revenue allowance (their preferred "price path").

In February 2019, shortly after publishing our Draft 2020 Plan, we held a webinar with our large users, to provide them an opportunity to question and understand the detail of our plans and to share further information on proposed revisions to our Access Arrangement. This webinar was followed up with individual meetings where requested.

Large customers have also been consulted on a number of service changes we have considered. These changes were aimed at reducing customer costs and including suggestions such as opening up the market for end user connection services (service contestability) and reducing the high-rise metering configuration choices available. These conversations were targeted towards customers with a specific interest in the strategy such as property developers.

Several large gas customers also attend our Customer Council and therefore have a holistic view of the engagement and have been consulted throughout the process.

4.4 Ongoing engagement

Our ongoing customer research has continued during this time, and we have conducted several research programs to understand customers' needs and changes in the energy market-place.

Specifically we have undertaken research into customer awareness of and preference for gas. This research is conducted annually to inform our marketing strategy and measure the impact of each campaign.

We have also conducted customer satisfaction research to understand how customer view our service and identify areas for improvement; this research is conducted annually and forms one of corporate metrics.

We have learnt from this research that awareness of, and satisfaction with, JGN is growing. This reflects the effectiveness of work we have done to improve customer satisfaction. There is however a declining trend year-on-year for gas preference and an increasing trend for preference for electricity, driven by increasing interest in renewables. However we do see a marked improvement in the perception of natural gas for those customers who see our marketing campaign.

As the majority of customers do not usually have any need to interact with JGN – only 1 in 8 customers have interacted with us, we have begun Customer Satisfaction research this year, which is centred on specific customer experiences. This research aims to survey and talk to customers who have experienced the services we provide around new connections, abolishment, and outages. This is an ongoing research and the metrics will be reported on a quarterly basis.

From this research, we have learnt that high quality of work and low customer effort (clear and proactive communications) are key drivers of satisfaction. And we are on our way to review and re-design how we can communicate to our customers more effectively.

We have also continued to develop our understanding of customers by continuing to build on our customer segmentation model, and further refinement is planned through a trial involving 1,000 households with Meter Data Loggers, to better understand the utilisation of gas appliances and the related consumption.

Figure 4–2: JGN customer segmentation

To leverage the benefits of the knowledge and experience of the customers we have been working with during the engagement process we have asked all customers involved to express their interest in being part of our ongoing research and development, including the opportunity to participate in our Customer Council, and have now developed a pool of informed customers to work with throughout the next period.

Furthermore we are currently assessing how some of this information will be shared through our first Energy Charter Disclosure report.

Smart Metering

In today's energy environment knowledge is power and understanding all energy sources within the home can assist our customers to better achieve their energy goals.

We have recently launched a trial at 1,000 homes across our network using gas meter data logging technology to record natural gas usage.

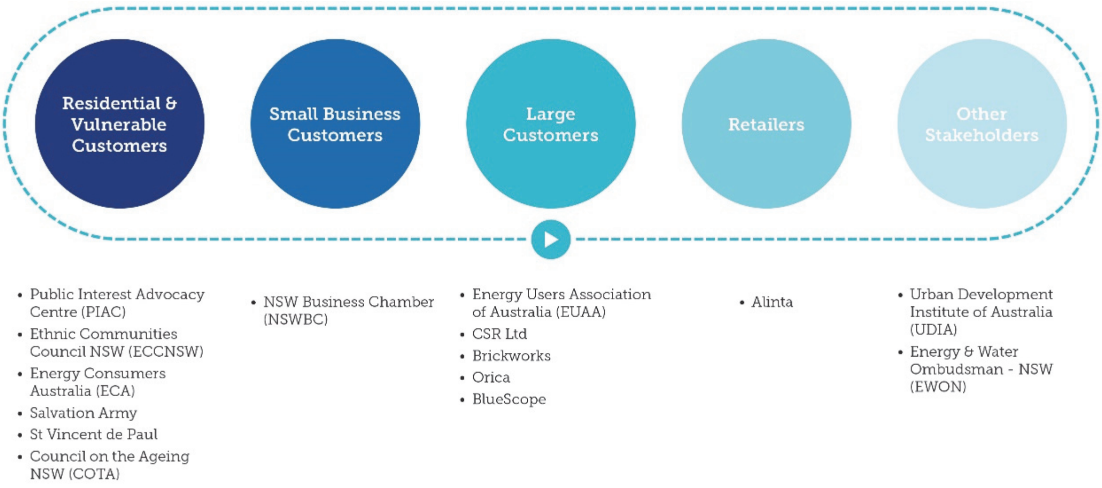
The trail aims to empower customers with information that allows them to optimise their energy usage and gain a better understanding of how decisions made within the home affect their bills.

The trial will provide us with valuable intel into new and emerging communication technologies. Data collected will also inform customer demand profiles and how customer demographics and appliance mix affect their gas supply requirements.

4.5 Customer Council engagement

Our Customer Council has been in place since October 2013. Building strong working relationships with industry stakeholders, key customers and customer advocates through our Customer Council, ensures we have an ongoing source of the voice of customer.

Figure 4-3 Our Customer Council members



As we developed our 2020 Plan, we met with the Customer Council at each phase of our engagement program to seek their input and advice on both the structure and the content of our engagement program. The members of the council were invited to attend the engagement and many of them took up this offer and not only attended but participated and supported customers through the process.

We also held individual and small group meetings with Customer Council members to hear their views and seek expert advice on specific topics related to our 2020 Plan.

The Council's advice has been influential in terms of the groups we have engaged, strategies we have or haven't progressed, and the structure and content of our engagement. Their participation and commitment to the process has been recognised and appreciated by customers as well as ourselves.

Customers from our Forums joined a Customer Council meeting in October 2018 to share their views, and their feedback was valued. We are therefore considering having customers as ongoing members for the council, so that the benefits of this engagement program live on in the organisation and continue to ensure we meet the needs of our customers. To ensure transparency we invited customers from our forum to attend a Customer Council meeting, this was very successful and has led to the ongoing inclusion of additional end use customers (both residential and industrial) to the Council.

4.6 Retailers

JGN held a forum for NSW gas retailers in Melbourne in March 2018. JGN had excellent participation from retailers. During our engagement process, we had direct one-on-one conversations with all energy retailers whether they were large or small, who between them hold an 100% share of the NSW gas market. We spoke to:

- AGL
- Covu
- Origin
- Alinta
- Energy Australia
- Click Energy
- Red / Lumo
- Vocus / M2
- Simply Energy

Retailers taking a break from engagement

5. Engagement outcomes – customer and stakeholders

5.1 Residential – end-customer engagement

Throughout our engagement sessions, it was clear that our customers enjoyed the benefits of natural gas and, in line with our ongoing market research, they confirmed that once they had experienced using it they had a preference for it. Overall, they believed natural gas gave them value for money, and often described it as being 'affordable', but they—specifically those customers on lower incomes—were concerned about increasing costs and for some customers with high gas consumption gas is a significant part of their cost of living, particularly in winter. The message we heard loud and clear from our customers was their desire for JGN to ensure gas remains affordable.

Our customers told us that they want to continue to use natural gas in the future, but they were conscious of the environment. They recognised that natural gas was a more environmentally-friendly choice at the moment than mains electricity, but they could also foresee significant changes in the energy market and were generally expectant that the industry would deliver a zero-carbon solution in the longer term.

Four key themes emerged in our discussions and we have used them to shape our 2020 Plan. These themes are: affordability, a safe and reliable gas service, fairness, and innovating and planning for the future.[2] We saw these themes emerge in the prioritisation exercises we conducted in our first forums, and we tested how well we had addressed customer feedback against these themes in our final forum.

At the beginning of the forums, we asked customers what their priorities were for their gas service.

Table 5–1: Customer's current priorities

Priority - now	Griffith	Goulburn	Western Sydney	Newcastle	Bathurst	Total
Price	8	9	12	11	11	51
Reliability	5	7	8	9	10	39
Safety	4	7	8	9	5	33
Fairness	5	3	5	4	6	23
Environment	4	7	3.5	5	4	23.5
Customer service	2	7	3.5	2	3	17.5
Aesthetics	2	0	0	0	0	2

Source: Report 3 Jemena Deliberative Forum Summaries mid-program summaries, RPS (included in Attachment 2.2)

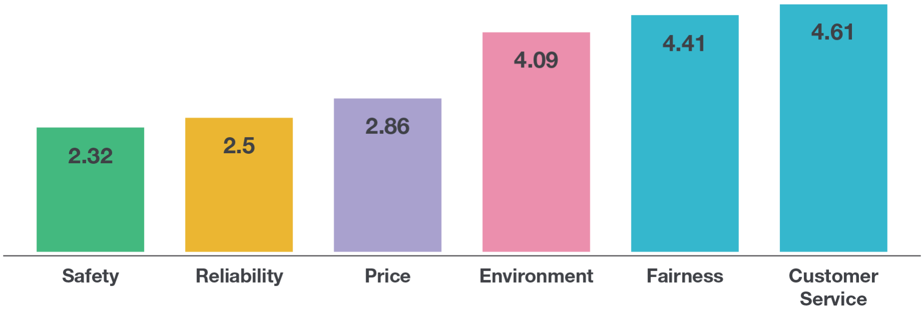
Affordability was the key issue, and therefore every decision we then discussed was done so in the light of any short or long-term bill impacts. This highlighted an important dynamic. For example, when price was traded off against reliability, customers were generally not prepared to compromise current service standards. Similarly, our customers told us that they were satisfied with current service standards and would not want to pay for these to be increased.

Customers were concerned about the environment, and this has been factored into our investment in the Western Sydney Green Gas Trial. We have not included this expenditure in our 2020 Plan (see Chapter 3 of our 2020 Plan for details).

We also conducted this exercise online and observed similar results (see Figure 5-1).

2 These four key themes, and our responses to them, are included in the 'Short on time' section of our 2020 Plan.

Figure 5–1: Q14 Please rank the following in order of priority, with 1 being most important and 6 being least important



Source: Yournetwork.jemena.com.au report

Once customers had had a chance to consider some of the factors that might affect the future of the gas network, we asked them their priorities for the future. As illustrated in Table 5-2, the response is very mixed; some customers want to go off-grid and take personal responsibility for their energy generation, while others clearly look to the energy industry to provide a community-wide solution. Customers are hopeful that renewables will provide a cheaper energy solution in the long run, but that is not the long-term priority. Similarly we heard that customers do not want zero carbon at any cost.

Table 5–2: Customers Future Priorities

Priority - future	Griffith	Goulburn	Western Sydney	Newcastle	Bathurst	Total
Zero Carbon energy for all of Australia	9	7	12	11	14	53
Reducing our need for energy (energy efficiency)	8	10	11	12	9	50
Individuals meeting their own energy needs	7	14	11	8	9	49
Reducing the cost of energy for all customers	6	9	6	9	5	35

Source: Report 3 Jemena Deliberative Forum Summaries mid-program summaries, RPS (included in Attachment 2.2)

As it was not possible to discuss every decision with customers we asked customers to provide guidance for JGN to use when making decisions. We asked customers to think about decisions we might make now as we prepare our 2020 Plan, and the decisions that we will make on a day-to-day basis throughout the 2020-25 period. We worked with customers out-of-session to develop a framework of the four key themes: Reliability – The Future – Affordability – Fairness. Customers felt these themes were the central pillars for making good decisions on behalf of customers.

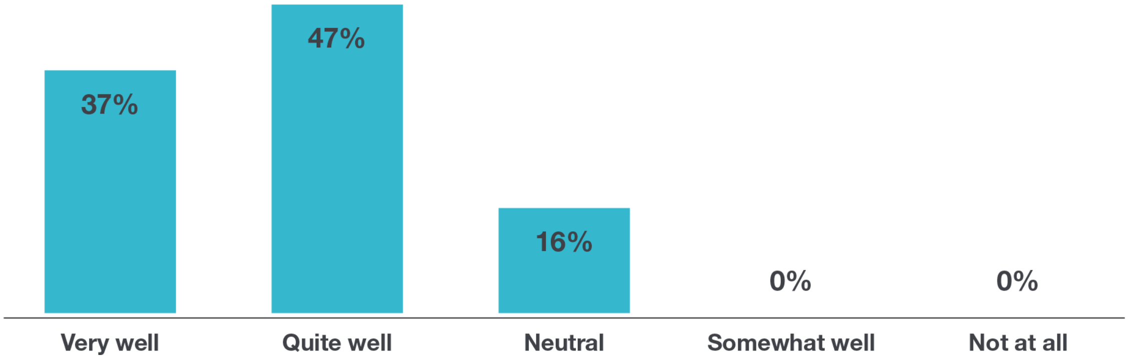
The principles customers developed will now act as a 'Voice of the Customer' reference point throughout the business and have substantially guided the development of our 2020 Plan. These principles are summarised below.

Reliability

- Make sure gas is available to customers when they need it
- Reliability is important because we have options to use other energy sources
- Maintain the same level of gas service for all customers
- JGN should ensure a safe and reliable gas supply is never compromised

As part of the fourth forum we held with customers on our Draft 2020 Plan, we asked them to vote on how well we had responded to their feedback on reliability. As shown in Figure 5-2, 84% of our customers considered that we had responded either very well or quite well to their feedback.

Figure 5–2: Customer voting results 'On a scale of 1 to 5, how well do you think Jemena responded to customer feedback on the issue of reliability.'



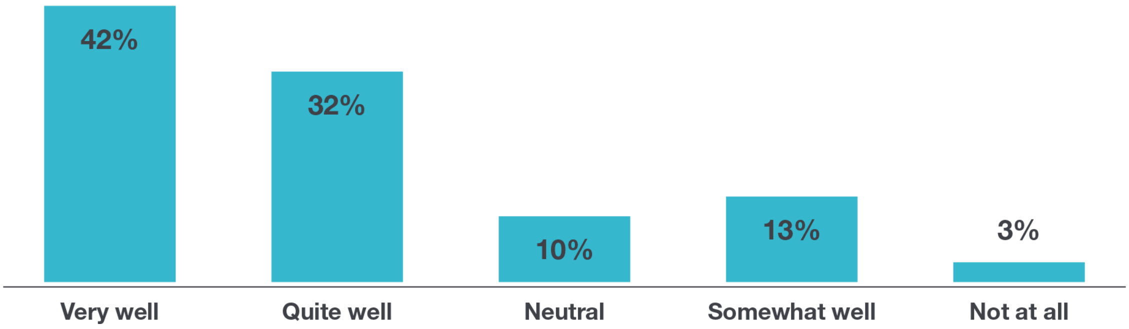
Source: Draft 2020 Plan Consultation Report, RPS (included in Attachment 2.2)

The Future

- Customers want green solutions
- Happy to invest in clean energy options, but not at the expense of higher prices
- We have a moral obligation to future generations
- Customers want clarity of government policy and commitment

As shown in Figure 5-3, 74% of our customers considered that we had responded either very well or quite well to their feedback on the future in our Draft 2020 Plan.

Figure 5–3: Customer voting results 'On a scale of 1 to 5, how well do you think Jemena responded to customer feedback on the issue of the future.'



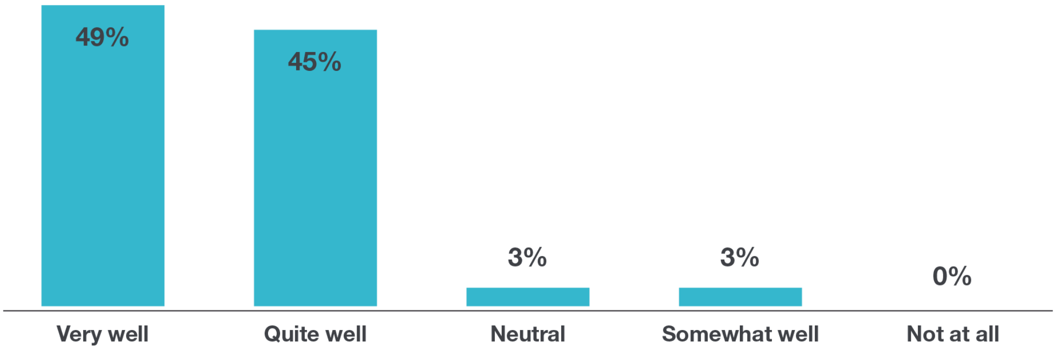
Source: Draft 2020 Plan Consultation Report, RPS (included in Attachment 2.2)

Affordability

- Affordability stimulates future growth
- Recognise that some customers really struggle to pay their bills
- Don't underestimate the impact of change on people
- Every $1 matters – you don't know where it's coming from

As shown in Figure 5-4, 94% of our customers considered that we had responded either very well or quite well to their feedback on affordability in our Draft 2020 Plan.

Figure 5–4: Customer voting results 'On a scale of 1 to 5, how well do you think Jemena responded to customer feedback on the issue of affordability.'



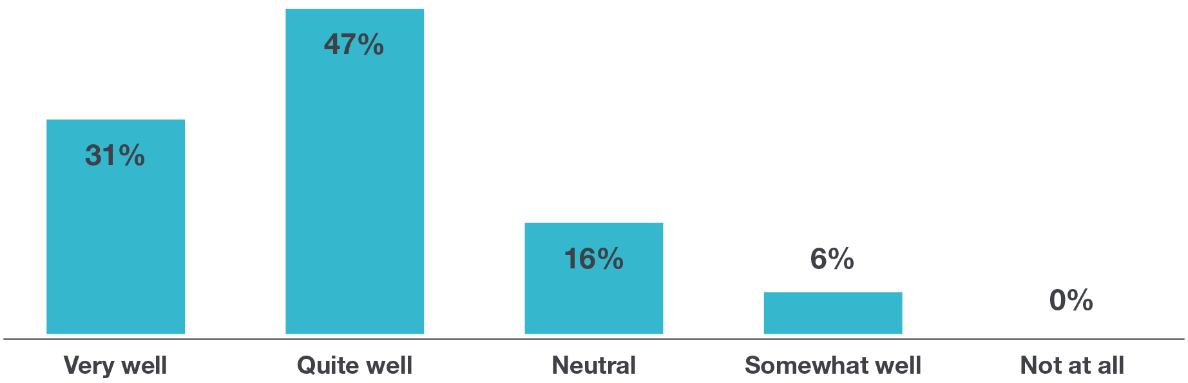
Source: Draft 2020 Plan Consultation Report, RPS (included in Attachment 2.2)

Fairness

- Gas should be reliable because that's what you're paying for
- Give people choices because everyone is in different circumstances
- Fairness is recognising that everyone is created equal
- Continue to seek feedback from customers about what a fair outcome might be

As shown in Figure 5– 5-5, 78% of our customers considered that we had responded either very well or quite well to their feedback on fairness in our Draft 2020 Plan.

Figure 5–5: Customer voting results 'On a scale of 1 to 5, how well do you think Jemena responded to customer feedback on the issue of fairness.'



Source: Draft 2020 Plan Consultation Report, RPS (included in Attachment 2.2)

The voting corresponding to customer views on specific topics is shown below.

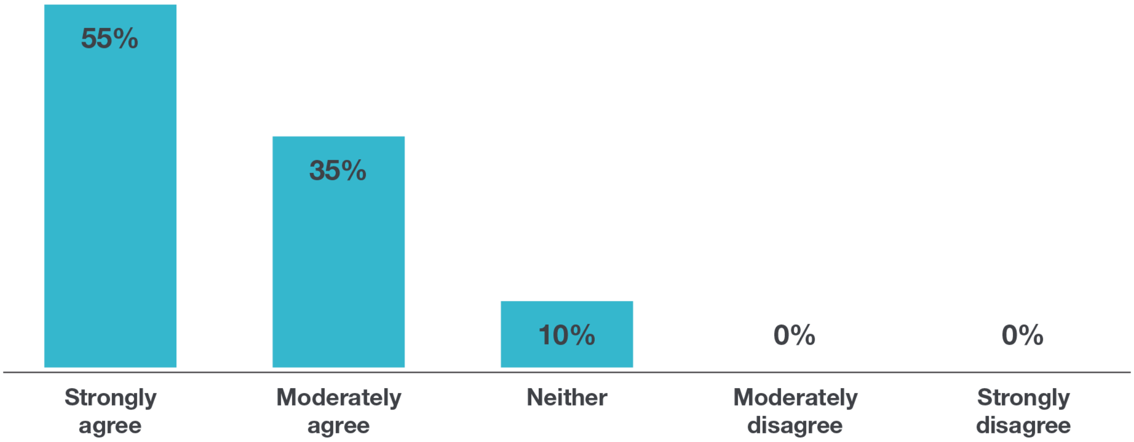
Table 5–3: Customer views on JGN proposals

Recommendation (phrasing is indicative only)	Goulburn	Griffith	West Syd	Bathurst	Newcastle	Over 55	CALD
To help manage future uncertainty around the long-term viability of JGN's gas network, JGN should recover money spent on new pipes. For more information refer to Attachment 7.10 Asset Lives:							
Over a 30 year period	75%	64%	82%	83%	94%	Yes (group vote)	Yes (group vote)
Over a 50 year period	25%	36%	18%	17%	6%	No	No
To help manage future uncertainty around the long-term viability of JGN's gas network, JGN should change its asset investment strategy to plan for a shorter-term window (~10 years) rather than assuming that customers will always use gas, and that the network has a secure long-term future. For more information refer to Attachment 5.1Capital Expenditure	25%	36%	18%	61%	0%	NA	NA
JGN should phase its prices to achieve a smooth as possible retail bill path for customers between 2020-2025. For more information refer to Attachment 4.1 Reference Services and Tariffs	100%	100%	100%	89%	94%	NA	Yes group vote

Source: Report 2 Jemena Customer Engagement Report, RPS (included in Attachment 2.2)

As the final part of our engagement process we asked customers one final key questions, did they think JGN's approach for 2020-2025 is in their long-term interests. Figure 5-6 shows the answer was an overwhelming ***yes,*** with 55% of customers strongly agreeing**.**

Figure 5–6: Customer voting results 'To what extent do you agree that the Jemena Gas Networks' Draft 2020 Plan is in the long-term interests of customers?''



Source: Draft 2020 Plan Consultation Report, RPS (included in Attachment 2.2)

Through an in-depth and consultative process we can proudly say that we have delivered a plan that despite the varying needs of our customers, finds a fair balance and is in their long-term interests.

While these principles are helpful to understand the broad feedback we received from customers, we discussed a large number of topics some of which were specific ways we could implement customer preferences. The table below details a few of the key areas we discussed with customers, what they told us and how we have actioned this.

Chairman Mr Ruan with customers at our final forum

Table 5–4: What our residential customers told us and how we are responding

Topic we engaged on	What customers said	How we are responding
What are customers' key priorities and service preferences	• Keep gas affordable • Maintain the current service standards	• We have delivered a number of network bill reductions for residential customers since 2014-15 (excluding the impact of inflation). Network bills will drop again in 2021 and by 2025, a typical customer's network bill will be lower again • Improving cost competitiveness • Reducing revenue requirement on a per customer basis • Maintaining current service levels
What are customers' expectations and priorities for the future	• Work towards a renewable future but not at any cost • Generally, a positive sentiment towards a transition to hydrogen	• Investing $8M in the Power to Gas trial we will only seek to recover hydrogen or future fuel innovation costs from customers if the trial is successful and the technology is capable of being utilised within our network • Future Fuels Cooperative Research Centre support • We will not propose an innovation allowance at this time
How should we support vulnerable customers	• Customers would be happy to pay an additional $1 per annum to fund increased support for vulnerable customers • Jemena however was not seen as the appropriate channel for this • Customers find the gas bill confusing and complex	• We are not proceeding with providing vulnerable customer support in our 2020 Plan • Lowering prices is the best outcome • Advocating for retailers to pass on network price reductions • Advocating for retail bills in other languages • Signing up to the Energy Charter (refer to page 30) to advocate for vulnerable customers across the industry
Whether to change the profile of cost recovery of future investments to strike a fair balance between current and future customers	• Customers want us to take a proactive approach to managing future uncertainty and to minimise any negative customer consequences, such as future bill increases • Changing the recovery period for new, medium pressure mains and services assets was seen as a low risk or 'no regrets' approach	• We have incorporated customer preferences on the profile of cost recovery into our 2020 Plan. We tested the 2020 Plan as a whole with customers, enabling them to see the impact of cost recovery changes in the context of the overall plan and they confirmed their support for this change at our March 2019 forums. • We are proposing to expense corporate overheads which will reduce capital expenditure in the long term and help

		improve the cost-competitiveness of gas over the long term
Changes to our investment strategy	• Customers expect the gas network to be ready for the future. They want us to continue to invest with a positive outlook for the future of gas	• We have taken this feedback into account and balanced it against other feedback provided • Following the publication of our Draft 2020 Plan we received customer endorsement of our investment strategy. More details are provided in Chapter 5 and Attachment 5.1
What are customer preferences on how they would like to receive any price decreases across 2020-25	• Residential customers have a clear preference for a smooth retail bill, and expressed the importance of stability in managing budgets • Customers expressed concern that efforts were made to ensure any savings were passed on to them	• Our proposed price path is designed to mitigate movements in the forecast wholesale gas price • We will advocate for retailers to pass on network price reductions •
Connection charge for all-electric homes connecting to gas	• Customers thought a customer contribution to the cost of a new connection was fair in principal • Customers were concerned about the price charged and the impact that would have on new connection volumes and hence the gas price	• Analysis showed the benefit of the upfront contribution was outweighed by the reduction in forecast connection volumes • We are not proceeding given that further analysis showed that this could increase bills for existing customers
Estimated meter readings	• Customers were concerned about the impact of estimated meter readings on budgeting and feel estimates are generally unfair • They expect Jemena to continue to investigate and manage estimations including technology solutions as they become affordable	• We are taking action now rather than waiting for 2020 to reduce the number of estimated meter reads. These actions have already driven a step change improvement in meter reading performance • Our proposed capital expenditure sharing scheme (discussed in section 7) will include a service performance measure on our meter reading performance

Discussing bill impacts with customers

An independent report by our engagement partner RPS which outlines the methodology and content of the engagement is available in Attachment 2.2. Additionally samples of the materials used during the engagement are provided in Attachment 2.3.

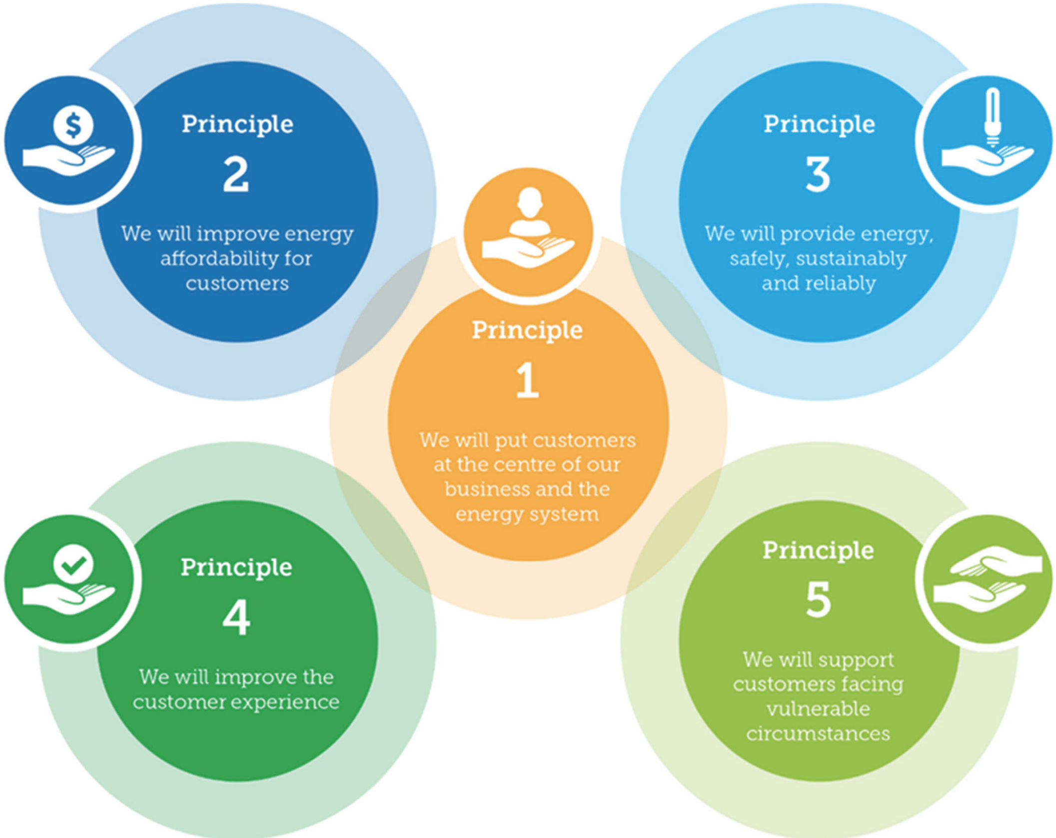
Energy Charter

A first of its kind and a whole-of-industry initiative, the Energy Charter represents a voluntary commitment by numerous Australian energy companies to 'put customers first' by challenging and holding ourselves accountable for being customer focused and transparent in what we do. See Fig 5.7 Energy Charter Principles.

"*The Energy Charter is an opportunity for our industry to make sure customers are front and centre. We know a lot of homes and businesses are doing it tough and the Charter is an opportunity for us to work on ways to bring down customer bills, provide more clean energy and enhance network reliability"*

Frank Tudor, Managing Director, Jemena

Figure 5–7: Energy Charter Principles



5.2 Small business – end-customer engagement

Small business customers varied considerably in their use of gas. Some customer had very seasonal usage particularly retail businesses that used gas for store heating, while others that used gas for cooking, or as part of their production processes (for example Griffith prune driers) had a much steadier gas usage profile.

All small businesses were concerned about the affordability of gas, and were aware that gas prices had increased over the past years. They found it hard to get a good deal from retailers and felt they had little control over the price. Some therefore had considered alternatives and some were looking to minimise their gas usage, but not all businesses felt that was an option for them.

Table 5–5: What our small business customers told us and how we are responding

Topic we engaged on	What customers said	How we are responding
Affordability and the impact of changes in the gas price	• Some customers perceive that gas is not the cheap solution it used to be • Some customers would look to minimise gas consumption and find alternatives if prices were to increase significantly • While affordability is the key issue, customers did not want to see service levels decline	• We delivered price decreases over the 2015-20 period and provide a further decrease in this 2020 Plan • We are improving cost competitiveness • We are reducing the amount of revenue we require on a per customer basis • We are maintaining current service levels
Expectations and priorities for the future	• Businesses tended to priortise their energy efficiency as a way of improving affordability and reducing their environmental impact • Few had considered the impacts of Hydrogen or other fuel types on their business and were uncertain what the implications would be	• Through our investment and involvement in the Future Fuels Cooperative Research Centre, we will help businesses to understand the impact of different fuel mixes and any impacts on their business

Table 5-5 above shows the topics we discussed, the feedback we heard and our response.

While some businesses were concerned about their environmental credentials few had considered the role of gas in that, but they did expect that as a business JGN would be working to reduce its environmental impacts in much the same way as themselves.

For further information about the engagement with small businesses please see Attachment 2.2 JGN's customer engagement (RPS), report 2 pages 119-210.

Many of the small businesses we engaged with were hospitality businesses

5.3 Large Customers

Natural gas has a critical role powering the businesses of some of our largest customers which causes these customers to be highly engaged with the gas industry on an ongoing basis. Our engagement therefore was an extension of our existing relationship management to understand the impacts of any changes we were proposing or any changes customers would propose to the Access Arrangement.

The engagement was a series of individual meetings and was also incorporated into our annual Large User Forum, details of the forum are included in Attachment 2.2, report 4 pages 251-285.

We heard from these customers that their key concern is the cost of gas, at both an absolute level and also ways in which they can manage their costs through contract negotiation, changes to service provision and in particular access to data that would allow them to improve and manage their energy efficiency.

They told us that the gas price and reliability are priorities for 2020-25, and beyond that, meeting environmental targets will become important. The net-zero carbon target (or general environmental trends) is something that their businesses are aware of and responding to, and they expect JGN to play a role in transitioning and preparing for this future. But the overall message was to keep things steady, avoid significant increases in price and price fluctuations, and any reduction in the cost of gas would be welcomed. The table below outlines some of the key feedback we received from this customer group and details how we are responding.

Table 5–6: What our large customers told us and how we are responding

Topic we engaged on	What customers said	How we are responding
Automatic reset of demand capacity	• Affordability is the number one concern	• We have incorporated an automatic reset of demand capacity to occur on 1 July 2020. We are also simplifying the process for customers to request resets after 1 July 2020
What are customer preferences on how they would like to receive any price decreases across 2020-25	• Price fluctuations are challenging to manage • Price pressure in the gas market caused by exports and wholesale gas prices is seen to be an issue for 2020-25 but they expect that beyond this the price will settle	• Prices have been steady in nominal terms since 2015-16 with price reductions proposed in this 2020 Plan • Our proposed price path will enable us to best meet customer preferences
Daily meter data service for large users	• Some large customers said that they would value access to the daily data Jemena is required to send to the market so that they have better visibility of their efficiency and can better manage costs	• We have recently launched our gas customer insights product that delivers usage information as a daily read email to assist key decision makers to understand and optimise their gas usage

These large customers communicated a range of different gas priorities that reflected the realities of their own businesses. We therefore segmented their feedback into three categories, based on the customer’s main priorities.

When comparing priorities, large customers generally told us that affordability is the most pressing need.

Table 5–7: Large customer priorities

Priorities	Large Customer Feedback	Industries Represented
1 - Affordability	• Many customers have tight operating/profit margins.	Manufacturing, transport, property development, food manufacturing, power generation, manufacturing in building materials, educational institutions and hotels
2 - Energy efficiency	• Customers are already implementing efficiency measures and /or looking to alternative energy sources. • Customers want JGN to lead the way in research and technology such as carbon-neutral fuels and low-cost hydrogen.	
3 - Planning for the future	• Customers are interested in exploring new energy solutions. • Environmental targets and emerging technology were key themes but caveated with a key focus on maintaining affordability and reliability	

Large customers hear about the future of gas

Leading the way in research on carbon neutral fuels

JGN is committed to a net zero carbon future. Our Western Sydney Green Gas trial is an initiative aimed at testing the ability of the gas network to store renewable energy in the form of hydrogen.

The production of hydrogen by electrolysis and with energy sourced from renewables such as wind and solar has the potential to provide gas for NSW customers from pure water and with the only by products being oxygen.

In the long term hydrogen can be used as society's primary energy source including as hydrogen electric vehicles and home energy supply

Customers also expressed their views on a number of energy themes that would all have an impact on our proposal.

Table 5–8: JGN response to large customer priorities

Theme	What customers told us	JGN response
Affordability	The cost of gas needs to remain affordable	We understand that the cost of gas is important to our customers and therefore: Our prices for large businesses have been steady over the 2015-20 period with prices held constant in nominal terms from 2015-16 to 2018-19
	Gas costs need to be maintained at affordable levels, if not large users would investigate alternative energy sources.	• We recognise the gas price pressure faced by large businesses customers. • We will deliver network price reductions for large business customers. • We will reset large businesses' chargeable demand levels—where this would result in a reduction—on 1 July 2020. This enables large business customers the opportunity to reduce their capacity requirements and save on the network portion of their bill. • See Attachment 4.1 for further information.
A safe and reliable gas service	Planning for the long-term future of the network is important but this needs to be balanced with meeting the shorter term needs of small and large business (over the next 5 years).	JGN continuously strives to improve the customer experience for our large and small business customers. We have been consulting with our customers to ensure we incorporate their needs into our plans both in terms of the reliability we offer but also other elements of the service such as access to data.
Price Path	The majority of the large users preferred that we recovered our revenue as evenly as possible so as to provide steady or decreasing network bills.	• JGN will deliver network price reductions for large business customers. • Following the initial price decrease in 2021, we have developed our proposed price path to best enable us to provide steady network prices for large customers

Theme	What customers told us	JGN response
		• The challenge for steady 2020-25 prices is that we are returning approximately $169M ($2020) of revenue (see Chapter 7 of our 2020 Plan). Returning revenue means we will necessarily have to decrease price levels below what our prices would otherwise have been—followed by a price increase once the revenue is returned. We have developed our proposed price path and side constraint to, after an initial decrease, best enable us to provide steady network prices for large customers.
Innovating and planning for the future	Most customers believed JGN should be proactive in investing in new technology, specifically Hydrogen. There was concern that hydrogen is still an expensive process that needs further development.	We are innovating for a low carbon gas future. We are evaluating decarbonisation pathways for the distribution network in areas such as Hydrogen and Biomethane.
	It was indicated that any innovation would be supported if approved by the regulator and only if it meant a price reduction.	

Large customers consider their priorities

Gas Customer Insights

JGN already provides many of our large volume customers with daily meter reads as part of ensuring network reliability. A priority for these customers is to ensure their operation is optimising energy use and working efficiently.

We have recently launched our gas customer insights product that delivers usage information as a daily read email to assist key decision makers to understand and optimise their gas usage. The product includes volume flow and heating value which are key to understanding real energy usage for reporting and forecasting.

5.4 Developers and other stakeholders

In preparing our 2020 Plan, we engaged with NSW Government agencies, embedded network providers, the Housing Industry Association and the Master Plumbers Association.

In addition, we consulted with a range of developers that we work with on a day-to-day basis, to hear their views on specific topics we have been investigating, like boundary metering. Table 5-9 summarises their feedback.

Table 5–9: JGN Response to Developer Feedback

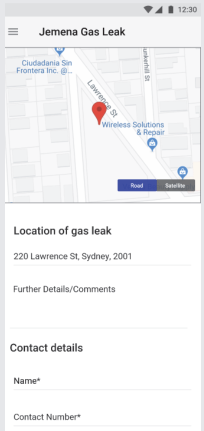
Theme	What customers told us	JGN response
Boundary metering for greenfield high-rise with centralised hot water	Different developers have different strategies with regard to high rise metering, and therefore responses varied. On the whole developers see boundary metering as the direction the high rise market would naturally take but would appreciate adequate notice of the change. Some developers, particularly where they go on to be managers of the site, are concerned about the end customer experience and would welcome greater consumer protections and customer choice.	We have: Developed simplified explanatory material Set a 1 July 2020 start date to ensure developers have time to cater for the changes Will continue to engage on ways to enhance the end-customer experience of gas and related services See Chapter 4 of our 2020 Plan for further information.
Customer connections – service contestability	Developers key concern was that enough notice was provided for them to be able to incorporate the change into their processes. Some concern was also raised about how the training and accreditation process would work to enable their contractors to undertake the work.	Not proceeding.

Gas Fault Reporting

Our customers are always looking for easier channels to interact with us including new digital channels.

JGN is currently developing a new web-based gas fault reporting tool to assist customers to quickly and safely report a gas leak. Once reported the submission will trigger a call back, emergency instructions and the despatch of a gas service technician to address any network faults.

We are particularly excited as this channel can be quickly modified to report other faults like vandalism as well as assist non-English speaking customers who may otherwise be reluctant to report faults and outages.



5.5 Retailers

In preparing our 2020 Plan, we engaged extensively in group and individual meetings with Retailers. While all the issues raised in these conversations will be considered as part of the Access Arrangement, there may be some we are able to progress as part of our business as usual activities.

Table 5–10: JGN Response to Retailer Feedback

What Retailers told us	JGN response
Services, tariffs and metering	
Some retailers requested us separate our combined disconnection and reconnection charge.	We do not have any compelling evidence of customer benefit to change our existing approach and therefor propose to continue with a combined disconnection and reconnection charge. See discussion at Attachment 4.1.
Simple pricing and tariff structures is desirable. Complex or multiple tariff changes may have costly system changes.	We are not proposing changes to our tariff classes or tariff structures and are maintaining our single reference service. We will improve some ancillary charges definitions and make some minor changes to tariff assignment criteria. See Attachment 4.1.
Minimising estimated meter reads and where necessary improving accuracy is a priority. JGN could consider Digital Metering solutions as part of this.	We use meter data loggers in many high rise buildings. We have evaluated options for digital metering solutions and at this point in time do not believe that wholesale digitalisation of gas meters would be either fair or commercially viable. We will continue to look at technology solutions and will adopt new technology where it will be in the interests of customers and market participants. We believe the Energy Charter also provides a platform for development of a whole of market response. In 2018 we implemented a project to reduce estimated reads which has driven substantial improvements. We will continue to work with retailers to minimise estimate reads including addressing site access issues. We have included metering costs in CESS to link investment in metering equipment with improved outcomes. Recent regulatory changes in relation to customer self reads will contribute to increased accuracy. We have reviewed and obtained feedback from customers,

What Retailers told us	JGN response
A clearer, simpler, faster and more visible process for new connections is desirable.	
Reference Service Agreement	
Three retailers provided feedback on proposed changes to the RSA.	We have incorporated a number of the comments made, including where the comments requested additional clarity or flexibility for the retailer. Only one retailer provided feedback on the proposed changes to the liability regime. For further detail see the RSA Changes attachment.
Minimising estimated meter reads and where necessary improving accuracy is a priority. JGN could consider Digital Metering solutions as part of this.	We use meter data loggers in many high rise buildings. In 2018 we implemented a project to reduce estimated reads which has driven substantial improvements. We have reviewed and obtained feedback from customers, we have evaluated options and at this point in time do not believe that wholesale digitalisation of gas meters would be either fair (in that not all customers will benefit equally) or commercially viable. JGN will continue to work with retailers to minimise estimate reads including site access issues. Recent regulatory changes in relation to customer self reads will contribute to increased accuracy.
A clearer, simpler, faster and more visible process for new connections is desirable.	JGN will continue to work with retailers and other stakeholders to streamline the connections process. We aim to significantly automate the connections process to create a more streamlined and efficient process for retailers, customers and JGN.