Electricity & Gas Retail Markets Report
Q1 2014

DOCUMENT TYPE:	**Information Paper**
REFERENCE:	**CER/14/136**
DATE PUBLISHED:	18th August 2014
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1.0 Introduction & Summary

The purpose of this paper is to provide industry and interested stakeholders with relevant information[1] on the developments of competition in the electricity and gas retail markets in the First quarter of 2014 (Q1 2014). The following summarises some of the key points in this report:

Market Share

- Energia entered both the domestic electricity and gas markets in January 2014.
- In electricity, Electric Ireland is the largest supplier in consumption (MWh) terms in the domestic, small business and LEU segments (shares of 57.39%, 38.71% and 39.2% respectively) and Energia was the largest in the medium business market. In comparison to Q4 2013, Electric Ireland's share of MWhs increased in the domestic and small business markets (by +0.19% and +1.86% respectively).
- Bord Gáis Energy's share of customers and MWhs continues to decline in the domestic electricity market and PrePayPower continues to gain market share in the domestic electricity market, by +0.3% compared to Q4 2013.
- In gas, Bord Gáis Energy remains the largest supplier in the domestic, IC and FVT segments (share of customer numbers of 56.03%, 40.89% and 30.25% respectively). However, Bord Gáis Energy continues to lose market share in these segments.
- Energia is the largest supplier in the RTF gas segment and lost market share in this segment.
- Electric Ireland continued to increase share in the domestic and RTF segments in gas, but lost share in the IC segment.

Switching

- Total switching in electricity and gas was 68,381 and 23,997 respectively in Q1 2014.
- In electricity, PrePayPower continued to experience the largest customer net gain in Q1 2014 (of +8,877). For the first time, SSE Airtricity experienced the highest net loss in a quarter in electricity (-9,136).
- In gas, Bord Gáis Energy continued to experience the largest net loss in Q1 2014 (of -8,325). Electric Ireland continued to experience the largest net gain (of +5,625 customers). Energia and Flogas also gained in Q1 2014 (+2,972 and +166 respectively).

Financial Hardship Pay-As-You-Go (PAYG) and Disconnections

- There were 5,075 electricity and 2,478 gas PAYG meters installed in Q1 2014 for customers in financial hardship. The total PAYG meters installed up to the end of Q1 2014 was 61,195 in electricity and 86,597 in gas.
- In Q1 2014, Bord Gáis Energy had the highest PAYG installation rate per customer in electricity, and Flogas had the highest rate in gas.
- In Q1 2014, there were 1,542 total disconnections for non-payment of account in the electricity market and 591 in gas.
- Electric Ireland had the highest domestic electricity disconnection rate per 10,000 customers and Flogas had the highest rate in gas.
- In early 2014, the CER, in conjunction with industry, reviewed the market processes to ascertain if more could be done in further reducing disconnections. While this work was ongoing the CER imposed a moratorium on domestic disconnections, which was lifted on 20th February 2014. Such a moratorium was not in place in previous periods which means that caution must be taken when making comparisons with early 2014.

[1] The primary sources of data in this report are: Electricity: MRSO (Meter Registration System Operator), ESBN (ESB Networks) and Gas: GPRO (Gas Point Registration Operator), Gaslink, BGN (Bord Gáis Networks).

2.0 Market Share

2.1 Electricity Market Share by Customer Numbers & MWhs

This section contains the market share data for all electricity suppliers. Data is presented in terms of actual customer numbers and consumption (MWhs) for Q1 2014 as well as showing the change in percentage share since the previous quarter.[2]

Q1 2014	Domestic Market Share	
	Cust Nos	MWhs
Electric Ireland	1,263,671	1,360,703
SSE Airtricity	365,567	509,851
Bord Gáis Energy	292,084	387,550
PrePayPower	76,012	80,570
Others	22,755	32,475
Total	**2,020,089**	**2,371,148**

1 (a) Domestic Market

Q1 2014	Small Business Market Share	
	Cust Nos	MWhs
Electric Ireland	91,967	384,746
SSE Airtricity	32,839	184,490
Bord Gáis Energy	17,071	92,207
Energia	44,225	327,529
Others	390	4,879
Total	**186,492**	**993,851**

1 (b) Small Business Market

Q1 2014	Medium Business[3] Market Share	
	Cust Nos	MWhs
Electric Ireland	14,914	342,871
SSE Airtricity	2,810	221,696
Bord Gáis Energy	971	79,775
Energia	5,657	372,659
Vayu	158	20,331
Others	31	2,881
Total	**24,541**	**1,040,214**

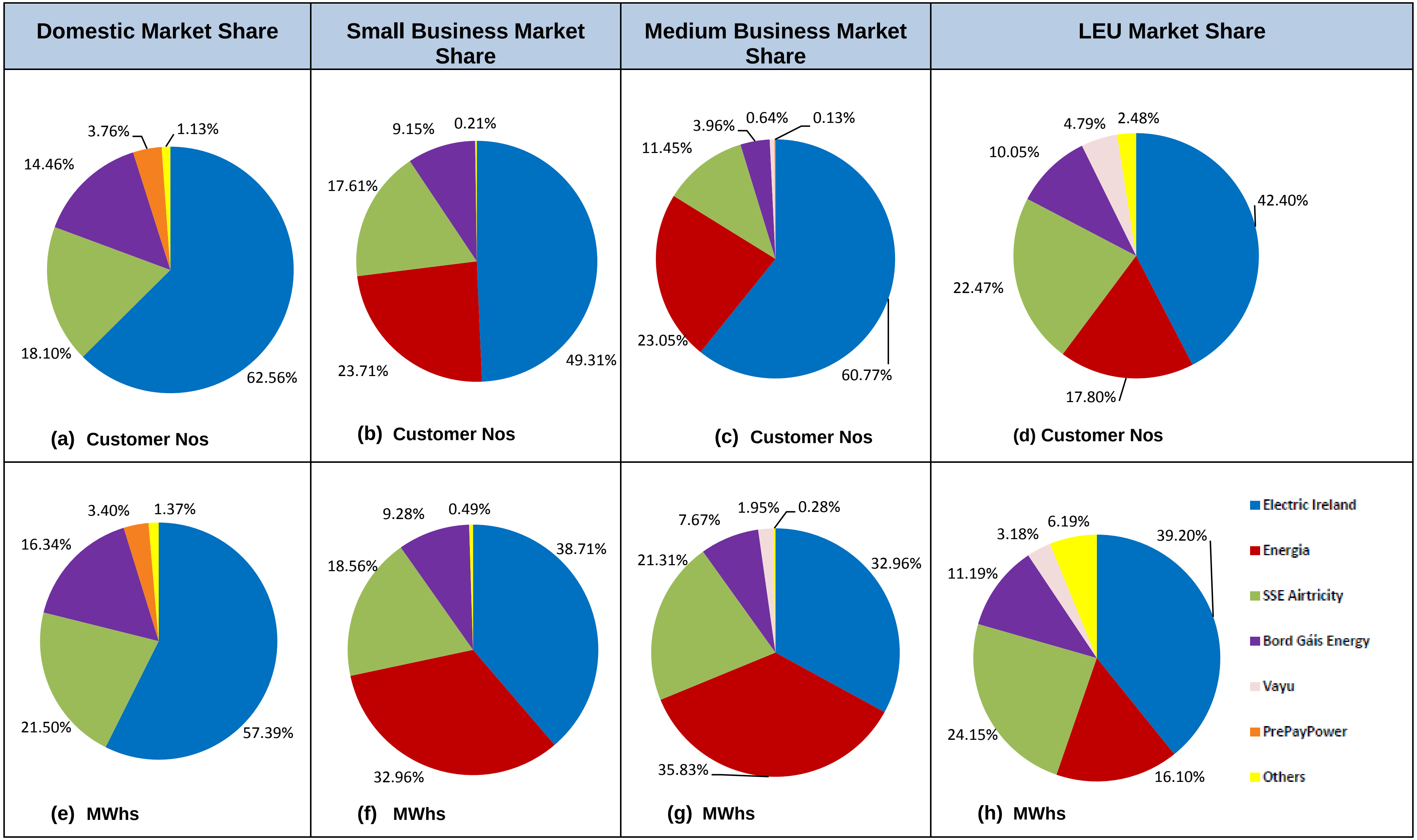
1 (c) Medium Business Market

Q1 2014	LEU Market Share	
	Cust Nos	MWhs
Electric Ireland	717	763,564
SSE Airtricity	380	470,350
Bord Gáis Energy	170	217,926
Energia	301	313,513
Vayu	81	61,906
Others	42	120,505
Total	**1,691**	**1,947,762**

1 (d) LEU Market

Tables 1 (a)-1 (d) Q1 2014 Electricity Customer Nos. & MWhs

[2] Only active electricity suppliers with greater than 1% share of MWhs are reported separately in each market segment.
[3] 'Medium-sized business' includes low voltage maximum demand (DG6) and public lighting (DG 3&DG4).



Figures 1 (a) – 1 (h) Q1 2014 Electricity Market Share by Market Segment

Q4 2013-Q1 2014	Domestic Market - Change in Market Share	
	Cust Nos	MWhs
Electric Ireland	-0.25%	+0.19%
SSE Airtricity	-0.41%	-0.52%
Bord Gáis Energy	-0.19%	-0.43%
PrePayPower	+0.44%	+0.30%
Others	+0.40%	+0.46%

2 (a) Domestic Market

Q4 2013-Q1 2014	Small Business - Change in Market Share	
	Cust Nos	MWhs
Electric Ireland	+0.60%	+1.86%
SSE Airtricity	-0.68%	-0.97%
Bord Gáis Energy	+0.05%	+0.43%
Energia	-0.02%	-1.39%
Others	+0.05%	+0.07%

2 (b) Small Business Market

Q4 2013-Q1 2014	Medium Business - Change in Market Share		LEUs - Change in Market Share	
	Cust Nos	MWhs	Cust Nos	MWhs
Electric Ireland	+0.15%	-0.49%	-2.42%	-2.15%
SSE Airtricity	-0.24%	0.00%	+0.68%	+2.04%
Bord Gáis Energy	-0.08%	+0.13%	+0.52%	+0.78%
Energia	+0.07%	+0.24%	+0.63%	-0.72%
Vayu	+0.12%	+0.16%	+0.47%	-0.01%
Others	-0.01%	-0.04%	+0.12%	+0.06%

2 (c) Medium Business & LEU Markets

Tables 2 (a)-2 (c) Change in Electricity Market Share from Q4 2013 - Q1 2014 by Supplier

- Customer numbers have declined in the small business and medium business segments since Q4 2013, by -0.3% and -0.05% respectively. Customer numbers increased in the domestic and LEU segments by +0.001% and 0.1% respectively.
- Energia entered the domestic electricity market in Q1 2014.
- Electric Ireland is the largest supplier in terms of customers across all segments, and is the largest supplier in consumption (MWh) terms in the domestic, small business and LEU segments (shares of MWhs of 57.39%, 38.71% and 39.2% respectively). In comparison to Q4 2013, Electric Ireland's share of MWhs increased in the domestic and small business markets (by +0.19% and +1.86% respectively) but declined in the medium business and LEU segments (by -0.49% and -2.15% respectively).
- Energia continues to be the largest supplier in terms of MWhs in the medium-sized business market (share of 35.83%). While Energia has gained market share in the medium business segment (by +0.24%), it has lost share in the small and LEU segments (by -1.39% and -0.72% respectively).
- Bord Gáis Energy is the third largest supplier in the domestic electricity market, however, its share of customers and MWhs continues to decline in this market. Its market share increased in the small, medium-sized business and LEU segments compared to Q4 2013 (increase in share of MWhs of +0.43%, +0.13% and +0.78% respectively).
- SSE Airtricity (the second largest supplier in the domestic and LEU segments) lost market share in the domestic, small and medium-sized businesses but increased share in the LEU segment.
- PrePayPower continues to gain market share in the domestic market, of +0.3% compared to Q4 2013. PrePayPower's share of customers or MWhs did not increase as much as the increase between Q3-Q4 2013.
- In Q2 2014, SSE Airtricity and Electric Ireland both introduced lifestyle choice prepayment plans for domestic customers in electricity.

2.2 Gas Market Share by Customer Numbers & GWhs

This section contains the market share data for all gas suppliers. Data is presented in terms of actual customer numbers and consumption (GWhs) for Q1 2014 as well as showing the change in the percentage share since the previous quarter.

Q1 2014	Domestic Market Share	
	Cust Nos	GWhs
Bord Gáis Energy	356,173	1,720
SSE Airtricity	109,651	559
Electric Ireland	134,032	647
Flogas	32,840	172
Others	2,994	7
Total	**635,690**	**3,105**

3 (a) Domestic Market

Q1 2014	NDM IC[4] Market Share	
	Cust Nos	GWhs
Bord Gáis Energy	9,437	215
SSE Airtricity	2,030	86
Electric Ireland	1,487	39
Flogas	5,794	183
Energia	3,932	109
Vayu	401	23
Total	**23,081**	**655**

3 (b) NDM IC Market

Q1 2014	FVT[5] eligible Market Share	
	Cust Nos	GWhs
Bord Gáis Energy	533	222
SSE Airtricity	299	109
Flogas	425	208
Energia	216	90
Vayu	276	136
Others	13	3
Total	**1,762**	**768**

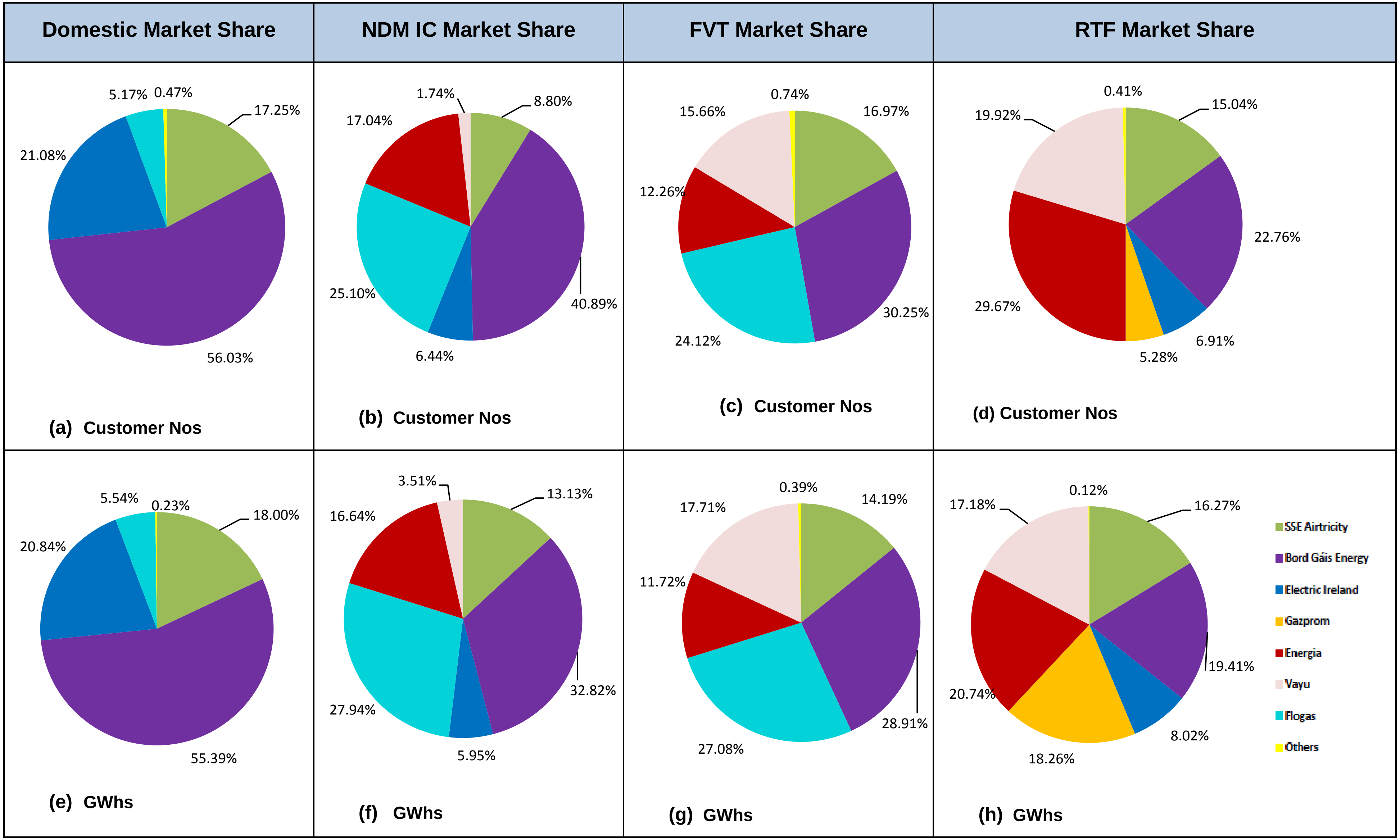
3 (c) FVT Market

Q1 2014	RTF[6] eligible Market Share	
	Cust Nos	GWhs
Bord Gáis Energy	56	322
SSE Airtricity	37	270
Electric Ireland	17	133
Gazprom	13	303
Energia	73	344
Vayu	49	285
Others	1	2
Total	**246**	**1,659**

3 (d) RTF Market

Tables 3 (a)-3 (d) Gas Customer Nos. (Q1 2014) & GWhs (Q1 2014)

[4] Non-daily metered industrial and commercial.
[5] Fuel variation tariff.
[6] Regulated tariff formula.



Figures 2 (a) – 2 (h) Q1 2014 Gas Market Share by Market Segment

Q4 2013-Q1 2014	Domestic - Change in Market Share	
	Cust Nos	GWhs
Bord Gáis Energy	-1.16%	-5.02%
SSE Airtricity	-0.07%	+0.15%
Electric Ireland	+0.78%	+4.31%
Flogas	+0.05%	+0.35%

4 (a) Domestic Market

Q4 2013-Q1 2014	NDM IC- Change in Market Share	
	Cust Nos	GWhs
Bord Gáis Energy	-0.82%	-2.11%
SSE Airtricity	+0.14%	+4.41%
Electric Ireland	-0.43%	+2.56%
Flogas	-0.36%	-2.92%
Energia	+1.46%	-1.76%
Vayu	+0.01%	-0.17%

4 (b) NDM IC Market

Q4 2013-Q1 2014	FVT- Change in Market Share	
	Cust Nos	GWhs
Bord Gáis Energy	-0.43%	-2.05%
SSE Airtricity	+0.63%	+5.92%
Flogas	+0.10%	+1.46%
Energia	-0.26%	-4.78%
Vayu	-0.04%	-0.75%
Others	+0.00%	+0.21%

4 (c) FVT Market

Q4 2013-Q1 2014	RTF- Change in Market Share	
	Cust Nos	GWhs
Bord Gáis Energy	+1.88%	+1.78%
SSE Airtricity	-1.02%	+0.90%
Electric Ireland	+0.08%	+2.90%
Gazprom	+0.06%	-1.06%
Energia	-0.45%	-2.00%
Vayu	-0.56%	-2.61%

4 (d) RTF Market

Tables 4 (a) – 4 (d) Change in Gas Market Share from Q4 2013 - Q1 2014

- Customer numbers have increased in the domestic, IC and FVT segments by +0.16%, +0.6% and +0.3% respectively compared to Q4 2013. Customer numbers declined in the RTF segment by -1.2% in the same period.
- Energia entered the domestic electricity market in Q1 2014.
- Bord Gáis Energy remains the largest supplier (customers and GWhs) in the domestic, IC and FVT segments (share of customer numbers of 56.03%, 40.89% and 30.25% respectively). While this is the case, Bord Gáis Energy continues to lose market share in each of these market segments (loss of customer share of -1.16% in domestic, -0.82% in IC and -0.43% in FVT). Bord Gáis Energy experienced an increase in RTF share in Q1 2014 compared to Q4 2013, by +1.88% in terms of customers and +1.78% in terms of GWhs.
- Energia is the largest supplier in the RTF segment. Energia lost market share in this segment compared to Q4 2013 (by -0.45%). It has also lost share in the FVT segment (of -0.26% in terms of customer numbers).
- Flogas (the second largest supplier in the FVT and IC segments) has lost share in the IC segment but increased share in the FVT market.
- Electric Ireland continued to increase share in the domestic and RTF segments, but lost share in the IC segment.
- All other suppliers had varied outcomes in terms of market share across market segments in Q1 2014 compared to Q4 2013.

3.0 Customer Switching & New Registrations

Customer switching is a key indicator of retail competition and supplier activity within the retail market. This section contains data on customer switching activity with a breakdown of suppliers' switches in the relevant markets and new registrations.

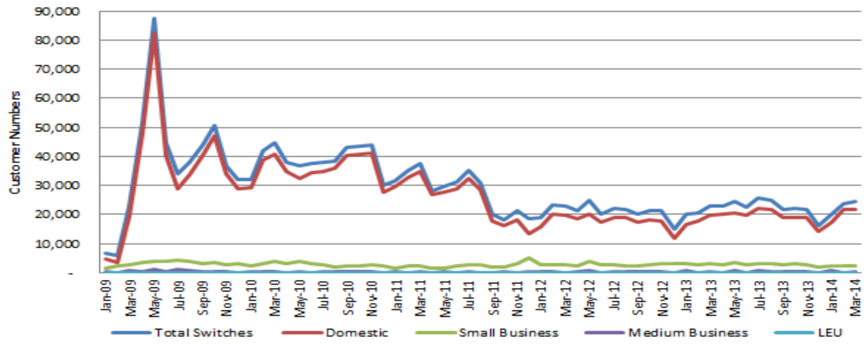


Figure 3 Total Switching - Electricity

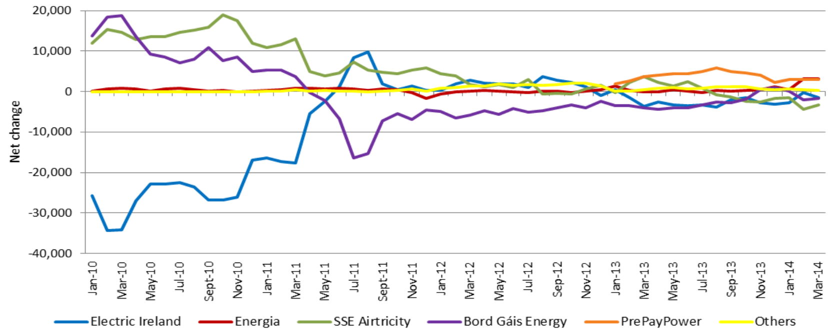


Figure 4 Total Net Change by Supplier - Electricity

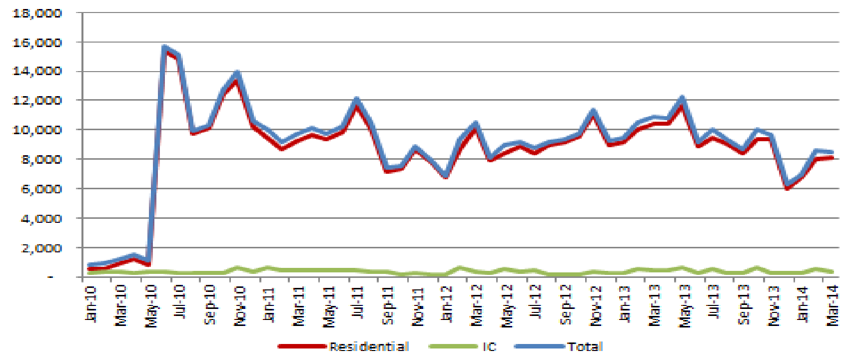


Figure 5 Total Switching - Gas

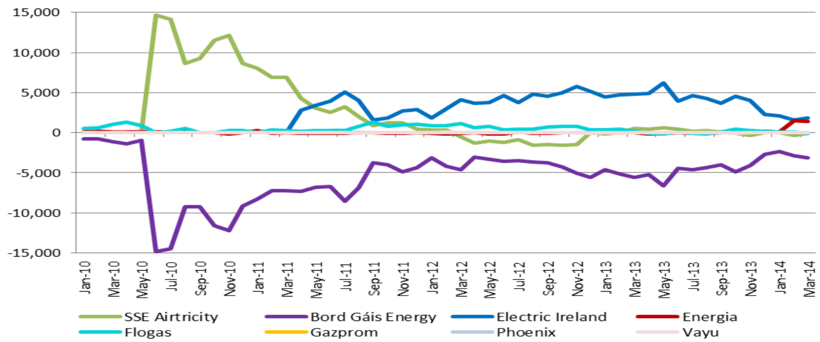


Figure 6 Total Net Change by Supplier - Gas

Total Switching	Q1 2012	Q2 2012	Q3 2012	Q4 2012	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014	% Change Q1 2013- Q1 2014
Electricity	64,788	66,271	63,730	57,267	63,574	69,964	72,480	60,206	68,381	*+7.6%*
Gas	26,705	26,245	27,276	30,353	30,783	32,214	28,045	25,960	23,997	*-22.0%*

Table 5 Electricity & Gas Total Switching Trends

Electricity Switching

- Total switching in electricity was 68,381 in Q1 2014 (88.5% of which was in the domestic market). This represented an increase in switching when compared to Q1 2013 of +7.6%.
- Compared to Q1 2013, switching increased in the domestic, medium business and LEU segments (by +12.4%, +2.9% and +89.6% respectively), however, switching declined in the small business segment by -22.3%.
- At a supplier level, PrePayPower continued to experience the largest customer net gain in Q1 2014 (of +8,877). However, Energia's net gain was also high at +6,777 (influenced by its entry into the domestic market in January 2014). A net gain was also experienced in the 'others' category (of +1,474).
- For the first time, SSE Airtricity experienced the highest net loss in a quarter in electricity (-9,136). Electric Ireland and Bord Gáis Energy continued to experience net losses in customers in Q1 2014 (of -4,427 and -3,565 respectively).

Gas Switching

- Total switching in gas was 23,997 in Q1 2014 (95.64% of which was in the domestic market). This represented a decline in switching of -22.04% compared to the same period in 2013.
- Total switching declined in the domestic and the IC segments by -22.26% and -17.12% respectively compared to Q1 2013.
- At a supplier level, Bord Gáis Energy continued to experience the largest net loss in Q1 2014 (of -8,325). A loss was also experienced by SSE Airtricity (of -439).
- Electric Ireland continued to experience the largest net gain (of +5,625 customers). Energia and Flogas also gained in Q1 2014 (+2,972 and +166 respectively).

New Registrations

- In Q1 2014, there were 3,584 new electricity and 1,490 new gas registrations.
- 84.07% of the new electricity registrations in Q1 2014 were with Electric Ireland, which represents an increase of 2.65% compared to the previous quarter.
- 69.33% of gas registrations were with Bord Gáis Energy, 3.69% more than in Q4 2013.

4.0 Financial Hardship PAYG, Debt Flagging & Disconnections

4.1 Financial Hardship Pay as You Go Meters – PAYG

The CER has been working with industry to facilitate the installation of electricity and gas PAYG meters free of charge for customers experiencing financial hardship. This section looks at the trend in the installation of PAYG meters.

PAYG Meters	Q1 2012	Q2 2012	Q3 2012	Q4 2012	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014	Cumulative total (approx.)
Electricity PAYG	2,485	3,596	4,384	4,248	5,303	7,323	7,336	6,629	5,075	**61,195 (including 14,105 Token meters)**
Gas PAYG	3,276	3,491	3,431	2,532	4,369	6,680	4,192	3,278	2,478	**86,597**

Table 6 PAYG Meter Installations Electricity & Gas

Electricity PAYG Install Rate	Electric Ireland	SSE Airtricity	Bord Gáis Energy
Q4 2013	0.25	0.47	0.56
Q1 2014	0.25	0.30	0.34

Table 7 Electricity PAYG Meter Installations Rate

Gas PAYG Install Rate	Electric Ireland	SSE Airtricity	Bord Gáis Energy	Flogas
Q4 2013	0.15	0.65	0.35	0.67
Q1 2014	0.12	0.56	0.32	0.58

Table 8 Gas (financial hardship) PAYG Meter Installations Rate

- There were 5,075 electricity PAYG meters installed in Q1 2014. This represents a 23% reduction compared to Q4 2013. The total number of electricity PAYG meters installed since October 2011 is 47,090. In addition, there were approximately 14,105 token meters in operation at the end of Q1 2014.
- In terms of the PAYG installation rate per customer by supplier, Bord Gáis Energy had the highest rate in electricity in Q1 2014, however there is not a large variance in terms of the PAYG installation rate across electricity suppliers.
- There were 2,478 gas PAYG meters installed in Q1 2014 (of which 84.58% were installed for financial hardship reasons). This represents a decline of 24.4% compared to Q4 2013. The total number of gas PAYG meters installed since December 2008 is 86,597, with almost 41,915 installed since October 2011.
- In terms of the PAYG installation rate per customer by supplier, Flogas had the highest rate in gas in Q1 2014.

4.2 Debt Flagging

Where a customer requests to change to a new supplier, the customer's existing supplier has the facility to inform the new supplier if the customer has an outstanding debt, above the industry thresholds approved by the CER. The new supplier can then choose whether to proceed with or cancel the change of supplier (CoS) request where this 'flag' has been raised.

Debt Flags	Electricity Market					Gas Market				
	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014
Total Debt Flags	1,188	1,558	2,176	1,426	1,061	174	382	439	298	166
Debt Flagged CoS request as % total CoS	1.93%	2.17%	2.93%	2.23%	1.67%	0.57%	1.19%	1.57%	1.15%	0.69%
% of Debt Flagged CoS orders Cancelled by New Supplier	23.1%	23.2%	15.1%	16.1%	23.6%	59.8%	70.2%	53.1%	40.6%	50.6%

Table 9 Debt Flagging in Electricity & Gas

- There were 1,061 debt flags raised in the electricity market in Q1 2014 (corresponding to approximately 1.67% of all CoS requests). This represents a decline of -25.6% compared to Q4 2013. Over 23% of all debt flagged CoS requests were cancelled by the new supplier in Q1 2014, representing a higher proportion than the number cancelled in Q4 2013.
- There were 166 debt flags raised in the gas market in Q1 2014 (corresponding to 0.69% of gas switches). This represents an decline of 44.3% in the number of debt flags raised compared to Q4 2013. Approximately 51% of debt flagged CoS requests were cancelled by the new supplier in Q1 2014, representing an increase in the proportion cancelled compared to Q4 2013.

4.3 Non-Payment of Account Disconnections

The disconnection of a customer's energy supply must always be the last resort and all suppliers are required to offer a payment plan and prepayment solution to customers in advance of proceeding to disconnect. This section analyses trends in disconnections for reasons of non-payment of account (NPA) in both electricity and gas.

4.3.1 Electricity Disconnections

Total Electricity Disconnections	Electric Ireland	SSE Airtricity	Bord Gáis Energy	Energia	Total Disconnections	% Of total that are in the domestic market
Q1 2012	887	2,658	1,325	193	**5,063**	82.50%
Q2 2012	1,248	1,276	892	194	**3,610**	82.08%
Q3 2012	1,971	1,436	649	125	**4,181**	83.58%
Q4 2012	3,091	740	614	140	**4,585**	87.50%
Q1 2013	1,105	991	429	166	**2,691**	74.92%
Q2 2013	900	1,088	787	135	**2,910**	79.45%
Q3 2013	1,732	1,069	661	148	**3,610**	83.66%
Q4 2013	2,107	487	471	115	**3,180**	87.23%
Q1 2014	925	344	137	136	**1,542**	76.26%
% Change Q1 2013-Q1 2014	*-16.29%*	*-65.29%*	*-68.07%*	*-18.07%*	*-42.70%*	

Table 10 Total Electricity Disconnections by Supplier

Domestic Elec Disconnections	Electric Ireland	SSE Airtricity	Bord Gáis Energy	Total
Q1 2012	693	2,326	1,158	**4,177**
Q2 2012	1,073	1,152	738	**2,963**
Q3 2012	1,707	1,259	530	**3,496**
Q4 2012	2,863	641	508	**4,012**
Q1 2013	859	860	297	**2,016**
Q2 2013	684	937	691	**2,312**
Q3 2013	1,554	920	546	**3,020**
Q4 2013	1,975	394	405	**2,774**
Q1 2014	852	241	83	**1,176**
% Change Q1 2013-Q1 2014	*-0.81%*	*-71.98%*	*-72.05%*	*-41.67%*

Table 11 Domestic Electricity Disconnections by Supplier

Domestic Disconnection Rate	Electric Ireland	SSE Airtricity	Bord Gáis Energy
Q1 2012	5.39	64.04	31.70
Q2 2012	8.30	31.59	20.99
Q3 2012	13.12	34.50	15.67
Q4 2012	21.94	17.56	15.46
Q1 2013	6.61	23.16	9.36
Q2 2013	5.35	24.65	23.11
Q3 2013	12.17	24.25	18.42
Q4 2013	15.57	10.54	13.69
Q1 2014	6.74	6.59	2.84
% Change Q1 2013-Q1 2014	*+1.9%*	*-71.5%*	*-69.7%*

Table 12 Domestic Electricity Disconnections per 10,000 Customers

- In Q1 2014, there were 1,542 disconnections for non-payment of account in the electricity market. 76.26% of these were in the domestic market.
- In early 2014, the CER, in conjunction with industry, reviewed the market processes to ascertain if more could be done in further reducing disconnections. While this work was ongoing the CER imposed a moratorium on domestic disconnections, which was lifted on 20th February 2014. Such a moratorium was not in place in previous periods which means that caution must be taken when making comparisons with early 2014.
- Electric Ireland had the highest domestic electricity disconnection rate per 10,000 customers. SSE Airtricity's rate was almost on par with Electric Ireland's, and Bord Gáis Energy had the lowest disconnection rate.

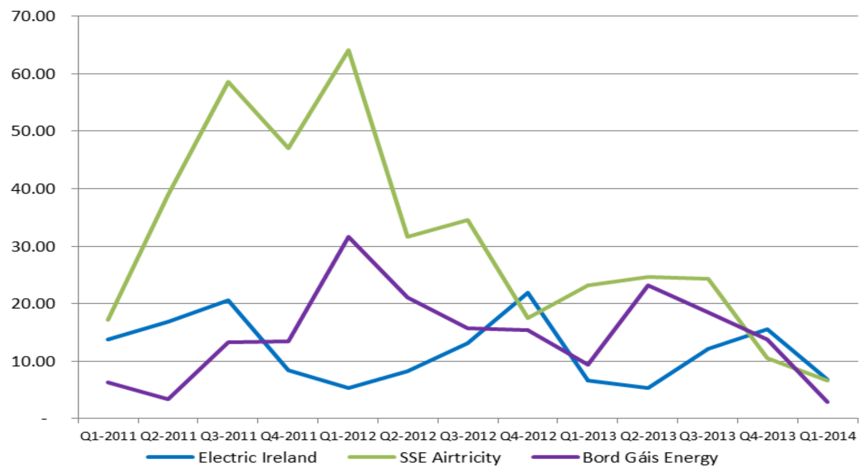


Figure 7 Domestic Electricity Disconnections per 10,000 Customers

4.3.2 Gas Disconnections[7]

Total Gas Disconnections	Bord Gáis Energy	SSE Airtricity	Flogas	Energia	Electric Ireland	Total Disconnections	% Of total that are in the domestic market
Q1 2012	1,342	189	153	21	1	**1,706**	90.39%
Q2 2012	1,815	283	274	10	5	**2,387**	91.6%
Q3 2012	1,803	480	165	9	22	**2,479**	95.8%
Q4 2012	543	305	106	13	19	**986**	91.6%
Q1 2013	338	351	137	23	11	**860**	88.8%
Q2 2013	1,631	329	156	8	34	**2,158**	94.4%
Q3 2013	1,485	499	278	12	39	**2,313**	95.2%
Q4 2013	599	249	51	6	43	**948**	93.9%
Q1 2014	397	103	43	16	32	**591**	89.7%
% Change Q1 2013-Q1 2014	*+17.5%*	*-70.7%*	*-68.6%*	*-30.4%*	*+191%*	*-31.3%*	

Table 13 Total Gas Disconnections by Supplier

[7] This data relates to disconnections that were undertaken for NPA reasons. It includes all credit locks, and NPA street isolations (CTSRs) and disconnect meters (DMs).

Domestic Gas Disconnections	Bord Gáis Energy	SSE Airtricity	Flogas	Electric Ireland	Total Domestic
Q1 2012	1,217	187	137	1	**1,542**
Q2 2012	1,646	276	261	4	**2,187**
Q3 2012	1,726	471	155	22	**2,374**
Q4 2012	490	303	91	19	**903**
Q1 2013	288	338	127	11	**764**
Q2 2013	1,556	322	127	33	**2,038**
Q3 2013	1,420	494	250	39	**2,203**
Q4 2013	555	249	45	41	**890**
Q1 2014	364	98	36	32	**530**
% Change Q1 2013-Q1 2014	*+26.4%*	*-71.0%*	*-71.6%*	*+191%*	*-30.6%*

Table 14 Domestic Gas Disconnections by supplier

Domestic Disconn rate	Bord Gáis Energy	SSE Airtricity	Flogas	Electric Ireland
Q1 2012	27.24	15.78	53.39	0.27
Q2 2012	37.64	24.04	96.34	0.81
Q3 2012	40.42	42.47	54.41	3.53
Q4 2012	11.84	28.04	29.85	2.43
Q1 2013	7.19	31.28	40.41	1.21
Q2 2013	40.36	29.43	40.42	3.11
Q3 2013	38.05	44.84	79.36	3.31
Q4 2013	15.29	22.66	13.85	3.18
Q1 2014	10.22	8.94	10.96	2.39
% Change Q1 2013-Q1 2014	*+42.2%*	*-71.4%*	*-72.8%*	*+98.0%*

Table 15 Domestic Gas Disconnections per 10,000 Customers

- In Q4 2014, there were 591 NPA disconnections in the gas market. Over 89% were in the domestic market.
- In early 2014, the CER, in conjunction with industry, reviewed the market processes to ascertain if more could be done in further reducing disconnections. While this work was ongoing the CER imposed a moratorium on domestic disconnections, which was lifted on 20th February 2014. Such a moratorium was not in place in previous periods which means that caution must be taken when making comparisons with early 2014.
- When adjusted for market share, Flogas had the highest disconnection rate per 10,000 customers.
- Electric Ireland continues to have the lowest domestic disconnection rate per 10,000 customers.

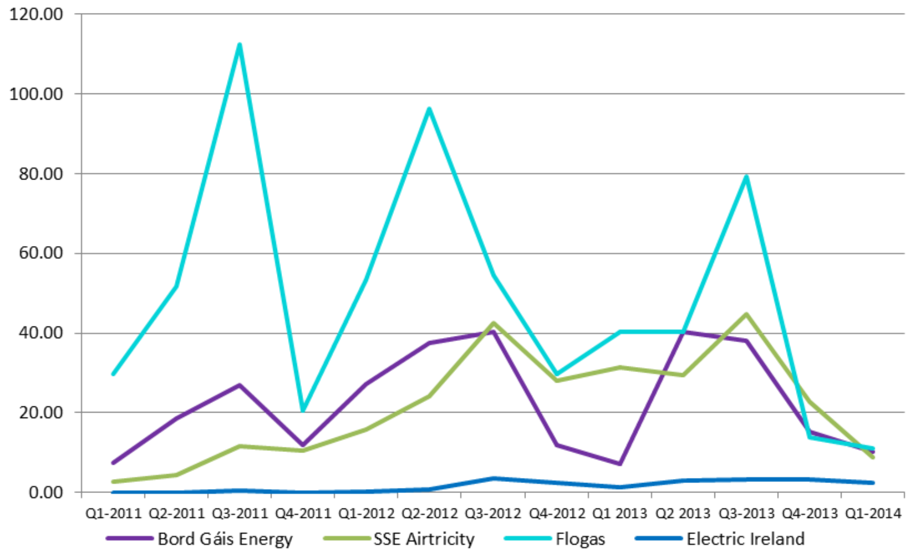


Figure 8 Domestic Gas Disconnections per 10,000 Customers