Electricity & Gas Retail Markets Report
Q3 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 third quarter of 2014 (July, August and September, Q3 2014). The following are the key points:

Market Share

- Electric Ireland is the largest supplier in terms of customers and consumption (MWhs) across all electricity segments (shares of MWhs of 55.92%, 39.07%, 35.93% and 41.54% in domestic, small business, medium business and LEU respectively). In comparison to Q2 2014, Electric Ireland's share of MWhs increased in all business segments but declined in the domestic segment (by -0.43%).
- SSE Airtricity's share of MWhs has declined across all electricity segments except the LEU segment. Conversely, Energia gained in all segments except the LEU. Energia had a 2.44% domestic market share in Q3 2014.
- PrePayPower continues to gain market share in the domestic electricity market, by +0.50% compared to Q2 2014.
- At the start of Q3 2014, Bord Gáis Energy was deregulated in the domestic gas market. Bord Gáis Energy remains the largest supplier of gas (customers and GWhs) in the domestic and IC segments, but has continued to lose market share in each of these market segments (loss of customer share of -1.50% in domestic and -0.81% in IC).
- Energia gained market share in all gas market segments, except the RTF segment. Electric Ireland continued to increase share in all gas market segments of operation.

Switching

- The total number of customers switching in electricity and gas was 81,894 and 30,363 respectively in Q3 2014. The switching rate between October-13 and September-14 was 13% and 16% in electricity and gas (290,757 & 106,650 total switches respectively).
- In electricity, Energia continued to have the largest net gain of customers in Q3 2014 (of +15,706). PrePayPower also continues to gain significantly (+7,543). SSE Airtricity continues to experience highest net loss (-10,134).
- In gas, Bord Gáis Energy continued to experience the largest net loss in Q3 2014 (of -10,034). Similar to electricity, Energia also experienced the largest net gain in gas (+9,615). Electric Ireland continued to experience a net gain (of +3,812).

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

- There were 6,120 electricity and 2,597 gas PAYG meters installed during Q3 2014. The cumulative number of PAYG meters installed up to the end of Q3 2014 was 71,787 in electricity and 91,921 in gas.
- In Q3 2014, suppliers had relatively similar PAYG installation rate per customer in electricity. SSE Airtricity had the highest rate in gas.
- In Q3 2014, there were 1,910 domestic disconnections for non-payment of account in the electricity market and 966 in gas.
- In early 2014, 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 2014.

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[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, GNI (Gas Networks Ireland).

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 Q3 2014 as well as showing the change in percentage share since the previous quarter.[2]

Q3 2014	Domestic Market Share	
	Sites	MWhs
Electric Ireland	1,249,957	993,762
SSE Airtricity	342,595	353,997
Bord Gáis Energy	284,283	296,186
PrePayPower	92,347	79,760
Energia	39,872	43,372
Others	13,742	10,085
Total	2,022,796	1,777,161

1 (a) Domestic Market

Q3 2014	Small Business Market Share	
	Sites	MWhs
Electric Ireland	92,055	316,841
SSE Airtricity	32,029	142,043
Bord Gáis Energy	17,090	72,484
Energia	43,906	274,653
Others	577	4,835
Total	185,657	810,856

1 (b) Small Business Market

Q3 2014	Medium Business[3] Market Share	
	Sites	MWhs
Electric Ireland	15,227	357,643
SSE Airtricity	2,458	188,277
Bord Gáis Energy	957	79,075
Energia	5,842	344,205
Vayu	167	23,373
Others	35	2,920
Total	24,686	995,492

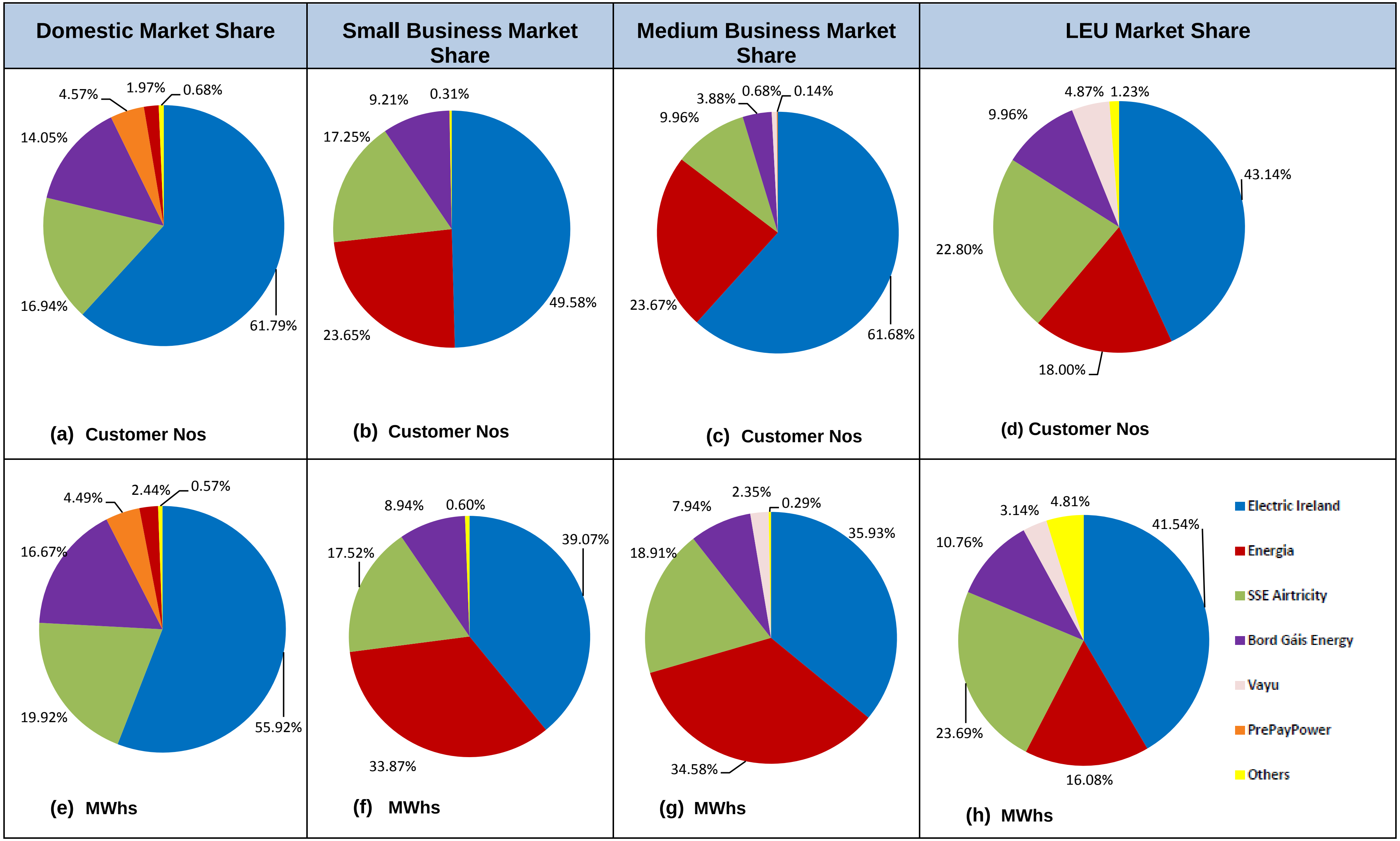
1 (c) Medium Business Market

Q3 2014	LEU Market Share	
	Sites	MWhs
Electric Ireland	736	880,419
SSE Airtricity	389	502,128
Bord Gáis Energy	170	228,011
Energia	307	340,795
Vayu	83	66,454
Others	21	101,871
Total	1,706	2,119,677

1 (d) LEU Market

Tables 1 (a)-1 (d) Q3 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) Q3 2014 Electricity Market Share by Market Segment

Q2 2014-Q3 2014	Domestic Market - Change in Market Share	
	Sites	MWhs
Electric Ireland	-0.38%	-0.43%
SSE Airtricity	-0.49%	-0.74%
Bord Gáis Energy	-0.40%	-0.15%
PrePayPower	+0.37%	+0.50%
Energia	+0.75%	+0.73%
Others	+0.15%	+0.10%

2 (a) Domestic Market

Q2 2014-Q3 2014	Small Business - Change in Market Share	
	Sites	MWhs
Electric Ireland	-0.04%	+0.02%
SSE Airtricity	-0.28%	-0.40%
Bord Gáis Energy	+0.09%	-0.06%
Energia	+0.14%	+0.42%
Others	+0.09%	+0.03%

2 (b) Small Business Market

Q2 2014-Q3 2014	Medium Business - Change in Market Share		LEUs - Change in Market Share	
	Sites	MWhs	Sites	MWhs
Electric Ireland	-0.14%	+0.62%	+0.93%	+0.65%
SSE Airtricity	-0.44%	-1.32%	+0.50%	+0.38%
Bord Gáis Energy	+0.02%	+0.05%	-0.16%	+0.14%
Energia	+0.51%	+0.45%	+0.26%	-0.10%
Vayu	+0.02%	+0.18%	+0.18%	-0.04%
Others	+0.02%	+0.01%	-1.70%	-1.03%

2 (c) Medium Business & LEU Markets

Tables 2 (a)-2 (c) Change in Electricity Market Share from Q1 2014-Q2 2014 by Supplier

- Customer numbers have declined in the small business and LEU segments compared to Q2 2014, by -0.16% and -0.12% respectively. Customer numbers increased in the domestic and medium business segments by +0.06% and +0.4% respectively.
- Electric Ireland is the largest supplier in terms of customers and consumption (MWhs) across all segments (shares of MWhs of 55.92%, 39.07%, 35.93% and 41.54% in domestic, small business, medium business and LEU segments respectively). In comparison to Q2 2014, Electric Ireland's share of MWhs continued to increase in all business segments (by +0.02%, +0.62% and +0.65% in small, medium and LEU respectively). However, Electric Ireland's share continued to decline in the domestic segment (by -0.43%).
- Energia has gained market share in the domestic, small business and medium segments (by +0.73%, +0.42% and +0.45%) but lost share in the LEU segment (by -0.1%).
- Bord Gáis Energy's share of MWhs has increased in the medium business and LEU electricity markets (+0.05% and +0.14%). However, its market share decreased in the domestic and small business segments compared to Q2 2014 (-0.15% and -0.06% respectively).
- SSE Airtricity continued to lose market share in the domestic, small business and medium business segments (-0.74%, -0.40% and -1.32%) but gained in the LEU segment (+0.38%).
- Vayu gained in the medium business segment (+0.18%) but lost share in the LEU (-0.04%).
- PrePayPower continues to gain market share in the domestic market, of +0.50% compared to Q2 2014.

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 Q3 2014 as well as showing the change in the percentage share since the previous quarter.

Q3 2014	Domestic Market Share	
	Sites	GWhs
Bord Gáis Energy	338,201	2,511
SSE Airtricity	106,492	814
Electric Ireland	142,943	957
Flogas	31,401	252
Energia	18,277	26
Total	**637,314**	**4,560**

3 (a) Domestic Market

Q3 2014	NDM IC[4] Market Share	
	Sites	GWhs
Bord Gáis Energy	9,085	363
SSE Airtricity	2,130	142
Electric Ireland	1,665	74
Flogas	5,916	357
Energia	4,020	200
Vayu	392	38
Total	**23,208**	**1,174**

3 (b) NDM IC Market

Q3 2014	FVT[5] eligible Market Share	
	Sites	GWhs
Bord Gáis Energy	527	431
SSE Airtricity	307	191
Flogas	429	431
Energia	214	179
Vayu	276	256
Others	14	6
Total	**1,767**	**1,494**

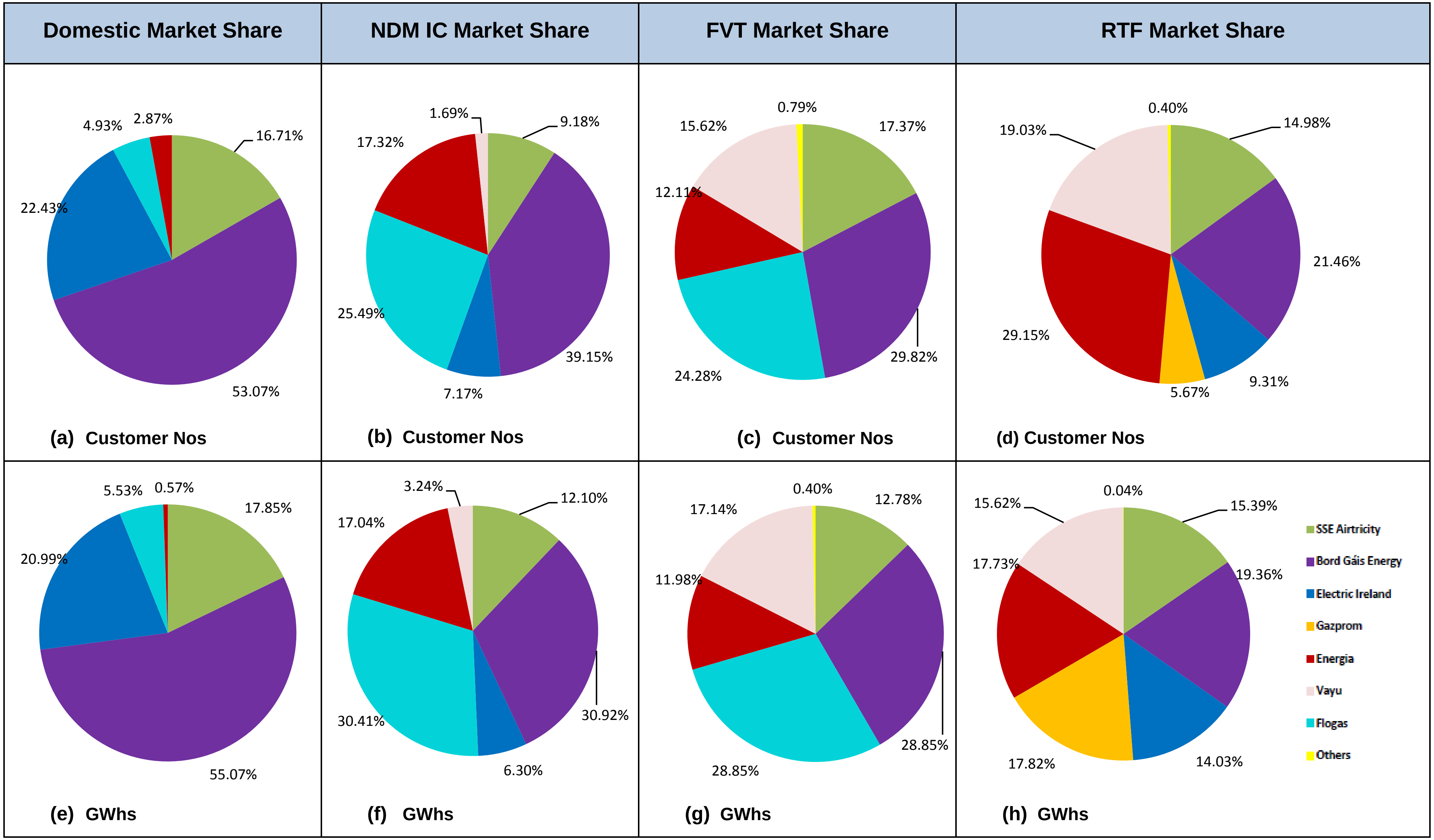
3 (c) FVT Market

Q3 2014	RTF[6] eligible Market Share	
	Sites	GWhs
Bord Gáis Energy	53	926
SSE Airtricity	37	736
Electric Ireland	23	671
Gazprom	14	852
Energia	72	848
Vayu	47	747
Others	1	2
Total	**247**	**4,782**

3 (d) RTF Market

Tables 3 (a)-3 (d) Gas Customer Nos. (Q3 2014) & GWhs (Jan-September 2014, allocations method)

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



Figures 2 (a) – 2 (h) Q3 2014 Gas Market Share by Market Segment

Q2 2014-Q3 2014	Domestic - Change in Market Share	
	Sites	GWhs
Bord Gáis Energy	-1.50%	-0.12%
SSE Airtricity	-0.30%	-0.09%
Electric Ireland	+0.56%	+0.04%
Flogas	-0.23%	+0.01%
Energia	+1.46%	+0.16%

4 (a) Domestic Market

Q2 2014-Q3 2014	NDM IC- Change in Market Share	
	Sites	GWhs
Bord Gáis Energy	-0.81%	-0.96%
SSE Airtricity	+0.08%	-0.57%
Electric Ireland	+0.28%	+0.18%
Flogas	+0.12%	+1.23%
Energia	+0.36%	+0.21%
Vayu	-0.03%	-0.09%

4 (b) NDM IC Market

Q2 2014-Q3 2014	FVT- Change in Market Share	
	Sites	GWhs
Bord Gáis Energy	-0.05%	-0.04%
SSE Airtricity	-0.19%	-0.64%
Flogas	+0.05%	+0.72%
Energia	+0.03%	+0.16%
Vayu	+0.15%	-0.18%
Others	+0.00%	-0.02%

4 (c) FVT Market

Q2 2014-Q3 2014	RTF- Change in Market Share	
	Sites	GWhs
Bord Gáis Energy	+1.46%	+0.04%
SSE Airtricity	-0.53%	-0.80%
Electric Ireland	+2.37%	+1.10%
Gazprom	-0.86%	+0.28%
Energia	-1.46%	-0.71%
Vayu	-0.97%	+0.11%

4 (d) RTF Market

Tables 4 (a) – 4 (d) Change in Gas Market Share from Q2 2014-Q3 2014

- Customer numbers have increased in the domestic, IC and RTF gas market segments by +0.09%, +0.3% and +0.8% respectively compared to Q2 2014. Customer numbers declined in the FVT segment by -0.2% in the same period.
- Bord Gáis Energy remains the largest supplier (customers and GWhs) in the domestic and IC segments (share of customer numbers of 53.07% and 39.15% respectively), in spite of continuing to lose market share in each of these market segments (loss of customer share of -1.50% in domestic and -0.81% in IC). At the start of Q3, Bord Gáis Energy was deregulated in the domestic market. Bord Gáis Energy is the largest supplier in the RTF segment in terms of consumption. It experienced an increase in RTF share in Q3 2014 compared to Q2 2014, of +1.46% in terms of customers and +0.04% in terms of GWhs.
- Energia continues to be the largest supplier in the RTF segment in terms of customer numbers, but lost market share of both customers and GWhs compared to Q2 2014 (-1.46% and -0.71%). Energia gained market share in terms of customers and GWhs in all other market segments.
- Flogas has increased share in the IC and FVT segment, but lost share of customers in the domestic market (-0.23%).
- Electric Ireland continued to increase share in all segments of operation.
- SSE lost market share in the domestic, FVT and RTF segments, and VAYU had a varied experience in market share across the market segments in which it operates.

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.

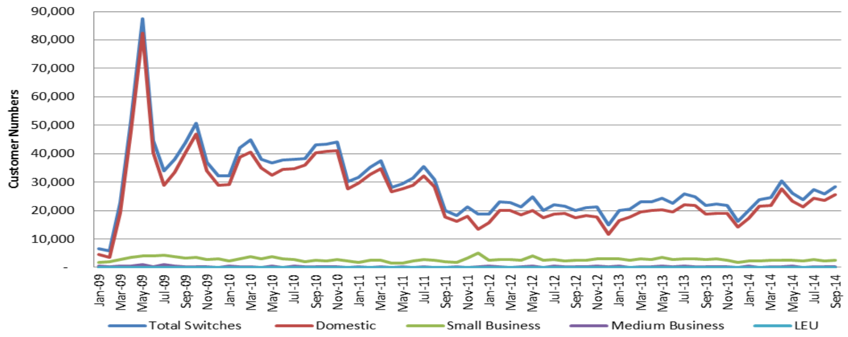


Figure 3 Total Switching - Electricity

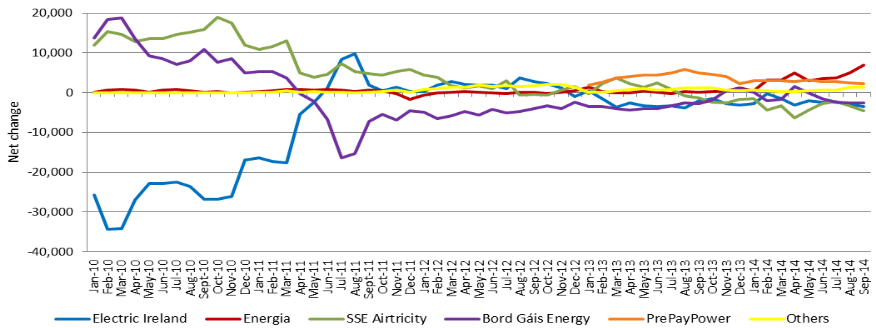


Figure 4 Total Net Change by Supplier - Electricity

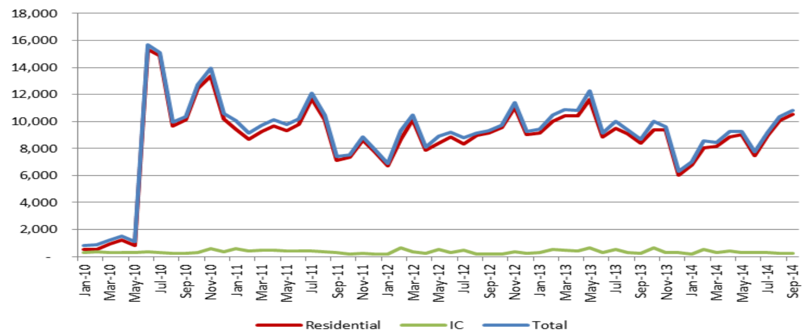


Figure 5 Total Switching - Gas

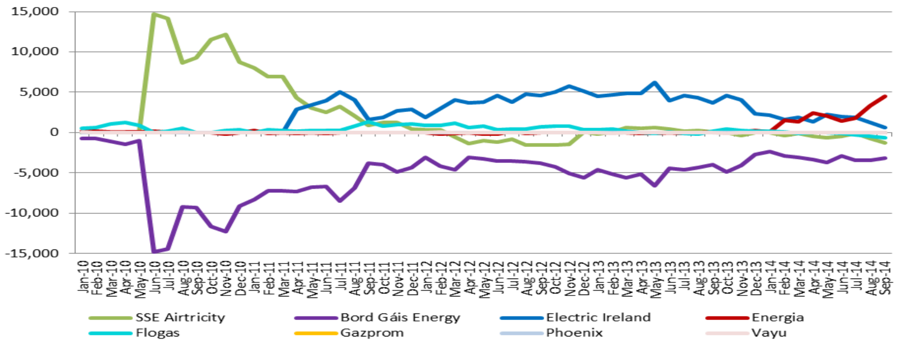


Figure 6 Total Net Change by Supplier - Gas

Total Switching	Q2 2012	Q3 2012	Q4 2012	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014	*% Change Q3 2013- Q3 2014*
Electricity	66,271	63,730	57,267	63,574	69,964	72,480	60,206	68,381	80,276	81,894	**+13.0%**
Gas	26,245	27,276	30,353	30,783	32,214	28,045	25,960	23,997	26,330	30,363	**+8.3%**

Table 5 Electricity & Gas Total Switching Trends

Electricity Switching

- The total number of customers switching in electricity was 81,894 in Q3 2014 (89.8% of which was in the domestic market). This represented an increase in switching when compared to Q3 2013 of +13%.
- Compared to Q3 2013, switching increased in the domestic market and LEU market (by +17.6% and +28%) but declined in the small and medium business segments (by -13.3% and -37.9% respectively).
- At a supplier level, Energia continued to experience the largest customer net gain in Q3 2014 (of +15,706), the highest net quarterly gain it has experienced since entering the domestic market in January 2014. PrePayPower also gained significantly (+7,543). A net gain was also experienced in the ‘others’ category (of +3,175).
- In Q3 2014, SSE Airtricity experienced its highest net loss in a quarter in electricity (-10,134). Electric Ireland and Bord Gáis Energy continued to experience net losses in customers in Q3 2014 (of -8,812 and -7,478 respectively).

Gas Switching

- The total number of customers switching in gas was 30,363 in Q3 2014 (97.5% of which was in the domestic market). This represented an increase in switching of +8.27% compared to the same period in 2013.
- Total switching increased in the domestic but declined in the IC segment by +9.64% and -26.94% respectively compared to Q3 2013.
- At a supplier level, Bord Gáis Energy continued to experience the largest net loss in Q3 2014 (of -10,034). A loss was also experienced by SSE Airtricity and Flogas (of -2,009 and -1,383 respectively).
- Energia continued to experience the largest net gain in gas of +9,615. Electric Ireland continued to gain customers (+3,812 customers).

New Registrations

- In Q3 2014, there were 4,730 new electricity and 1,732 new gas registrations.
- 82.64% of the new electricity registrations in Q3 2014 were with Electric Ireland, which represents a decline of -15.28% compared to the previous quarter.
- 65.59% of gas registrations were with Bord Gáis Energy, -1.08% less than in Q2 2014.

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	Q3 2012	Q4 2012	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Cumulative total (approx.)
Electricity PAYG	4,384	4,248	5,303	7,323	7,336	6,629	5,075	5,975	6,120	**71,787 (including12,602 Token meters)**
Gas PAYG[7]	3,431	2,532	4,369	6,680	4,192	3,278	2,478	3,193	2,597	**91,921**

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
Q2 2014	0.29	0.39	0.32
Q3 2014	0.33	0.32	0.31

Table 7 Electricity PAYG Meter Installations Rate

Gas PAYG[8] 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
Q2 2014	0.24	0.66	0.50	0.41
Q3 2014	0.22	0.45	0.42	0.39

Table 8 Gas (financial hardship) PAYG Meter Installations Rate

- There were 6,120 electricity PAYG meters installed in Q3 2014. This represents a 2.4% increase compared to Q2 2014. The total number of electricity PAYG meters installed since October 2011 is 59,185. In addition, there were approximately 12,602 token meters in operation at the end of Q3 2014.
- All electricity suppliers had relatively similar rates of PAYG installation per customer in Q3 2014.
- There were 2,597 gas PAYG meters installed in Q3 2014 (of which 90% were installed for financial hardship reasons). This represents a decline of -18% compared to Q2 2014. The total number of gas PAYG meters installed since December 2008 is 91,921 (with 47,705 installed since October 2011).
- In terms of the PAYG installation rate per customer by supplier, SSE Airtricity had the highest rate in gas in Q3 2014.

[7] Financial hardship and lifestyle choice.
[8] Financial hardship meters only.

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[9]. 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				
	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014
Total Debt Flags	2,176	1,426	1,061	1,398	1,374	439	298	166	254	287
Debt Flagged CoS request as % total CoS	2.93%	2.23%	1.67%	1.73%	1.67%	1.57%	1.15%	0.69%	0.96%	0.95%
% of Debt Flagged CoS requests (completed CoS in gas) Cancelled by New Supplier	15.1%	16.1%	23.6%	29.0%	31.4%	53.1%	40.6%	50.6%	44.1%	44.3%

Table 9 Debt Flagging in Electricity & Gas

- There were 1,374 debt flags raised in the electricity market in Q3 2014 (corresponding to approximately 1.67% of all CoS requests). This represents a decrease compared to Q2 2014. Approximately 31% of all debt flagged CoS requests were cancelled by the new supplier in Q3 2014, representing a higher proportion than the number cancelled in Q2 2014.
- There were 287 debt flags raised in the gas market in Q3 2014 (corresponding to 0.95% of gas switches). This represents an increase of 13% in the number of debt flags raised compared to Q2 2014. Approximately 44% of debt flagged CoS's were cancelled by the new supplier in Q3 2014, similar to the proportion cancelled compared to Q2 2014.

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.

[9] Domestic threshold: ≥ €225 for > 60 days from due. Small business & unmetered supply: ≥ €600 for > 30 days from due. Medium sized business: ≥ €1,200 for > 30 days from due.

4.3.1 Electricity Disconnections

Total Electricity Disconnections	Electric Ireland	SSE Airtricity	Bord Gáis Energy	PrePay Power	Energia	Total Disconnections	% Of total that are in the domestic market
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%
Q2 2014	1,289	676	512	221	100	**2,798**	86.42%
Q3 2014	1,015	568	470	114	81	**2,248**	84.96%
% Change Q3 2013-Q3 2014	*-41.4%*	*-46.9%*	*-28.9%*	-	*-45.3%*	*-37.7%*	

Table 10 Total Electricity Disconnections by Supplier

Domestic Elec Disconnections	Electric Ireland	SSE Airtricity	Bord Gáis Energy	PrePay Power	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**
Q2 2014	1,183	557	457	221	**2,418**
Q3 2014	901	467	428	114	**1,910**
% Change Q3 2013-Q3 2014	*-42.0%*	*-49.2%*	*-21.6%*	-	*-36.7%*

Table 11 Domestic Electricity Disconnections by Supplier

Domestic Disconnection Rate	Electric Ireland	SSE Airtricity	Bord Gáis Energy	PrePay Power
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	-
Q2 2014	9.41	15.81	15.64	26.06
Q3 2014	7.21	13.63	15.06	12.34
% Change Q3 2013-Q3 2014	*-40.8%*	*-43.8%*	*-18.3%*	-

Table 12 Domestic Electricity Disconnections per 10,000 Customers

- In Q3 2014, there were 2,248 disconnections for non-payment of account in the electricity market. 84.96% 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. Caution must be taken when making comparisons between 2013 and 2014.
- Bord Gáis Energy had the highest domestic electricity disconnection rate per 10,000 customers. SSE and PrePayPower had similar rates of disconnection. PrePayPower states that as a prepayment supplier, they only disconnect in situations where they suspect a site of being vacant based on an analysis of vend and consumption data or in cases of fraud.
- Electric Ireland had the lowest disconnection rate.
- Anecdotal evidence from suppliers suggests that a significant number of disconnected properties are in fact vacant. It has been previously estimated that in 2013, 40% of disconnected electricity sites were deemed to be vacant[10].

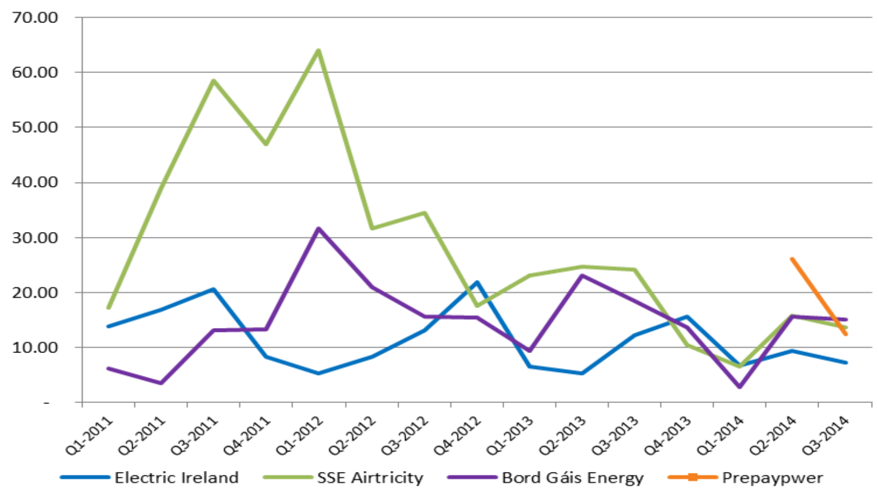


Figure 7 Domestic Electricity Disconnections per 10,000 Customers

[10] In 2013 vacant sites in electricity were regarded as those that were not reconnected within 5 weeks after disconnection.

4.3.2 Gas Disconnections[11]

Total Gas Disconnections	Bord Gáis Energy	SSE Airtricity	Flogas	Energia	Electric Ireland	Total Disconnections	% Of total that are in the domestic market
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%
Q2 2014	1,398	175	53	3	72	**1,701**	97.4%
Q3 2014	638	175	47	9	141	**1,010**	95.6%
% Change Q3 2013-Q3 2014	*-57.0%*	*-64.9%*	*-83.1%*	*-25.0%*	*261.5%*	*-56.3%*	

Table 13 Total Gas Disconnections by Supplier

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**
Q2 2014	1,366	175	43	72	**1,656**
Q3 2014	610	174	41	141	**966**
% Change Q3 2013-Q3 2014	*-57.0%*	*-64.8%*	*-83.6%*	*261.5%*	*-56.2%*

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
Q2 2014	39.32	16.16	13.10	5.17
Q3 2014	18.04	16.34	13.06	9.86
% Change Q3 2013-Q3 2014	*-52.6%*	*-63.6%*	*-83.6%*	*+198%*

Table 15 Domestic Gas Disconnections per 10,000 Customers

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

- In Q3 2014, there were 1,010 NPA disconnections in the gas market. Over 95% 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. Caution must be taken when making comparisons between 2013 and 2014.
- When adjusted for market share, Bord Gáis Energy had the highest disconnection rate per 10,000 customers.
- Electric Ireland continues to have the lowest domestic disconnection rate per 10,000 customers, but its rate is growing.
- Anecdotal evidence from suppliers suggests that a significant number of disconnected properties are in fact vacant. It has been previously estimated that in 2013, 36% of gas sites were deemed to be vacant[12].

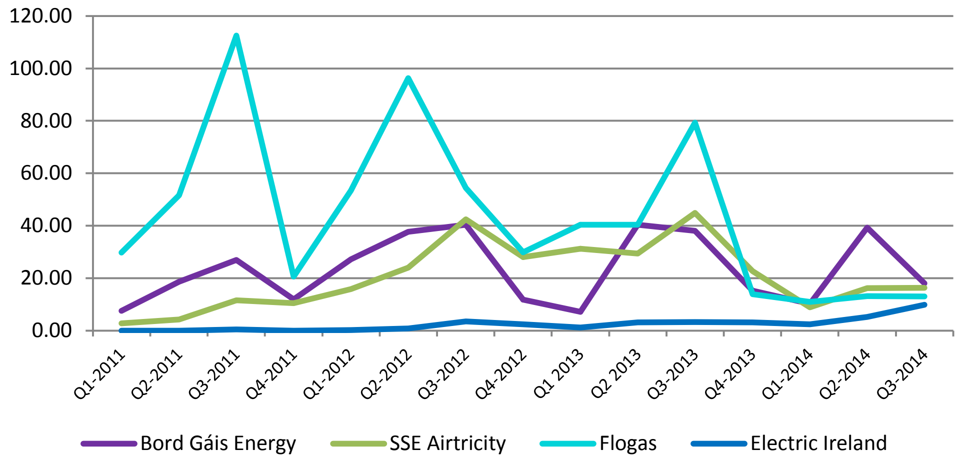


Figure 8 Domestic Gas Disconnections per 10,000 Customers

[12] In 2013 vacant sites in gas were regarded as those that were not reconnected within 6 months after disconnection.