

Wave 1 report: Summer 2025

Customer insight on GD3 Plan Draft Determination and People & Planet Strategy



- 1 **Background, Objectives & Methodology**
- 2 **Summary Findings & Recommendations**
- 3 **Consumer Context**
- 4 **GD3 Business Plan & Draft Determination**
- 5 **Deep Dive: 7- & 28-day repairs on gas escapes**
- 6 **People & Planet Strategy**
- 7 **Future Engagement**





Background

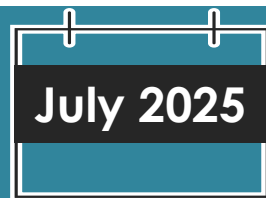
Northern Gas Networks' Citizen Panel is a long-standing engagement mechanism for the business, which allows its thinking to be challenged and tested by a broadly representative group of consumers.

In 2025, Blue Marble was appointed to refresh the approach and membership, and support NGN with its delivery.

Three waves of engagement will be held each year, comprising:

- Full-day workshop with a refreshed Workshop Panel;
- Depth interviews with a newly convened Inclusive Panel.

The initial focus will be customer engagement on the GD3 Business Plan delivery from 2026, then moving into developing new areas and service improvements.



Wave 1: Research Objectives

GD3 Business Plan (2026 – 2031)

1. Gain insight into customer perspectives on relevant topical issues
2. Enhance existing participant knowledge of the draft Plan, post submission to Ofgem. Build new participant knowledge of NGN's business plan commitments and regulatory requirements of NGN as a GDN
3. Engage on potential areas of change for the final submission
4. Identify priority areas for NGN to focus on and to engage on in future

People and Planet Strategy (focus on planet)

1. Gain insight into customer perspectives on priorities and pace on planet targets
2. Agree on new medium-term target date(s) for NGN's People and Planet commitments
3. With the proposed medium-term target date(s) in mind, put forward new targets for existing commitments



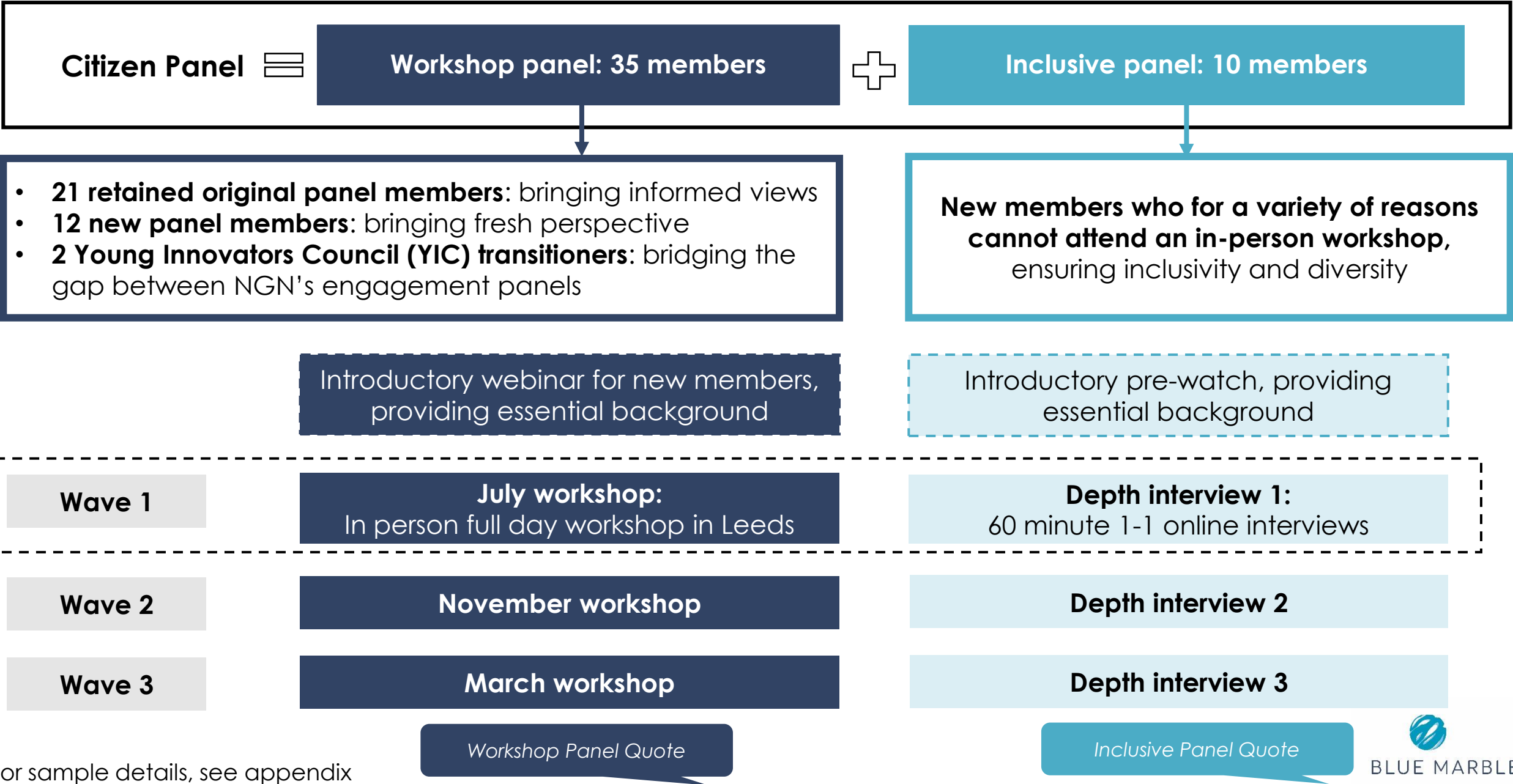




Photo by [Richard Horne](#) on [Unsplash](#)

Consumer context



BLUE MARBLE

Financial, rather than environmental concern is leading customers to cut down on their energy usage.

Money is the key driver in trying to cut down energy usage



- However, members with health conditions feel unable to cut down on their usage, due to the risks this can incur.
- 1 in 5 members are unemployed, not working due to their health conditions, or retired, putting many under financial pressure.

"One of the problems that we're all facing is the fact that every day the prices seem to go up. They go up like rockets and come down like feathers."

NHH

Supermarkets and energy companies are seen to be driving the issue

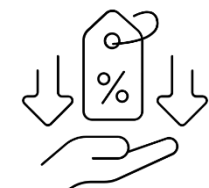


- These are the front of mind costs consumers struggle to manage, with some listing examples of food items increasing by significant amounts within months.
- There are strong concerns about perceived profiteering and predatory practices from these industries.

"The thing with gas and energy at the minute, you get a letter one week, see the price of gas is going down and you think great it's gone down. Then two or three weeks later it's gone back up again."

NHH

Consumers struggle to meaningfully reduce energy bills



- Members are using 'free hours' they get from suppliers to run energy-intensive appliances such as their washing machine, or using heated blankets in the winter, rather than their heating.
- Some members are trying to shop around, and change to cheaper tariffs, but the sense is that 'deals aren't deals anymore'.

"We can go to cheaper supermarkets for food but for the gas and electricity it's the same price whatever provider we go for. There's not even £10 or £20 difference between them, it's gone crazy."



Those struggling

- Most likely to be from lower SEG groups, living in social housing and / or out of work.
- Sudden changes in their health conditions or employment can quickly worsen their hardship, which makes it especially difficult to adjust to rising prices.
- They are the most anxious about the future and uncertain about how they will manage if prices continue to increase.

"I was in a very good job up until 2023 and then I had a stroke which meant I could no longer work. So that's why I'm struggling quite a bit."

Those just about managing

- Typically working age C1C2s, most of whom own their home and are feeling financially stretched.
- These members find their financial situations difficult to manage and have little income left after covering their essential costs.
- They describe cutting back on non-essentials and luxuries such as day trips, to manage rising prices.

"Although I'm working it's still always a worry because obviously you rely on this job, and if you don't have this job, what's going to happen to you?"

Those comfortable

- These members are older, mortgage-free homeowners, with secure savings and pensions.
- Feel in control of rising costs and can absorb bill increases without significant changes to their lifestyles.
- They are the most likely to be able to consider the environmental impacts when making energy choices.

"I have a good occupational pension that I was forced to join a lot of years ago otherwise I would be struggling. I downsized about 12 years ago which released a massive amount of equity. I apologise for being a boomer."





Many face significant day-to-day challenges due to health conditions or disabilities within their households

- This can result in higher energy costs, with one member requiring the heating to be on for most of the year, to manage their wife's health conditions caused by a brain haemorrhage.
- Many members feel overwhelmed managing their day-to-day lives and needs alongside the pressures induced by rising costs.



Financial pressures have forced most to make difficult trade-offs

- Rising food and energy costs have led inclusive members to cut back on leisure activities and in some cases limiting their use of central heating.
- These pressures are exacerbated by reduced incomes due to health conditions or being out of work. Some have had to use their savings to cover the rising cost of essentials.



Due to high bills, most have become more engaged with the energy sector

- Before energy bills increased dramatically, most inclusive members did not think too much about their energy supplier, or the sector.
- Many pay attention when Ofgem's energy price cap is changed, to shop around and find the cheapest tariff.



There is strong concern about climate change, but households feel they cannot drive action

17

In the eyes of members, companies and government need to take a greater responsibility in driving change, as individuals cannot afford to change much and their efforts will have limited impact.

Members identify key drivers for why they want to reduce their environmental impact

Fears about what condition the planet will be in for the next generation

Changing weather patterns and drought are highlighting the current impact of climate change

Ongoing news and media exposure to climate change is triggering concern

"Living with a young person who's a lot more clued up on it than I am has made me try and do little bits to make a difference because I think it's serious."

Most feel there are barriers preventing them from focussing on climate change in the short term

They perceive a national focus on individual action, but feel this is inadequate in the face of industrial-scale pollution and impact

Perception of greenwashing efforts erodes trust and makes it difficult to believe companies are serious about climate change

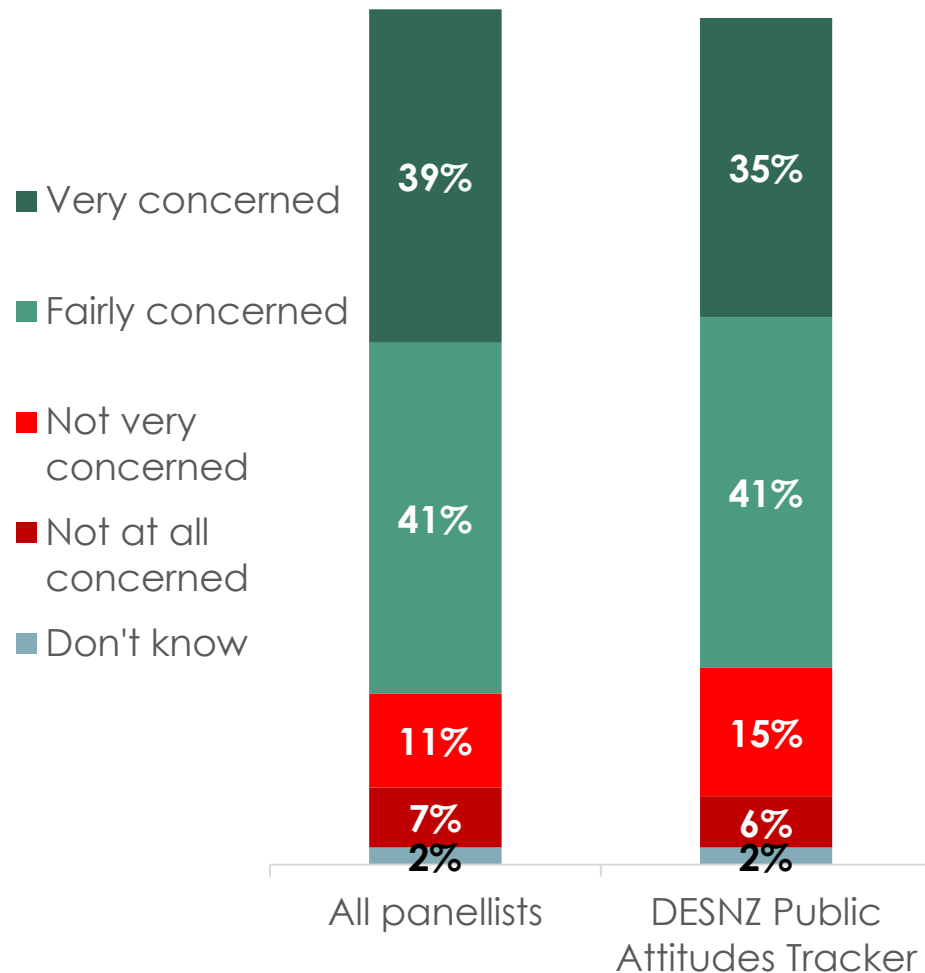
Meaningful changes like electric vehicles feel inaccessible and unaffordable

"Shell and other oil companies talk about their green credentials, but still invest ten times as much in their oil as they are in renewables."



How concerned, if at all, are you about climate change, sometimes referred to as 'global warming'?

Base: All panellists (46)



Many members are concerned about climate change, citing visible impacts such as droughts and dry weather, but often feel their individual actions are insignificant compared to the scale of the problem.

There is a strong belief that meaningful change needs to be driven by governments and large companies, due to the scepticism about how much an individual can realistically achieve on their own.

The climate action members currently see feels ineffective. Top of mind concerns are carbon offsetting schemes being misused, inconsistencies in food waste recycling and local schemes like cycle paths going unused.

Although some panellists are sceptical of what they hear via media on climate change, almost all supported the notion of NGN working to act on and prepare for climate change.

The context for talking about business plans & strategies is bleak



- The cost of utility bills is a major concern, which has worsened trust in companies to act in the interest of consumers.
- This also affects consumer appetite for investment where it increases bills.
- Paired with a general lack of faith in climate action, members are sceptical of the impact environmental policies can have.

Life feels out of control



- Members have felt the brunt of the economic instability in the UK, with all impacted by significant jumps in their bill costs within the past 18 months.
- Supermarkets and energy companies are seen to be engaging in predatory practices, taking advantage of the economic conditions, and causing hardship for consumers.

There is a lack of optimism for the future



- There is a strong sense that the UK is stuck in a pattern of economic uncertainty, with no clear solutions on the horizon.
- Few members had faith in the Government's ability to change this agenda.
- The economy, paired with climate change, left most members concerned about what life will be like for young people and future generations.





GD3 Business Plan & Draft Determination



BLUE MARBLE

Areas of disappointment may indicate low knowledge of the future role of natural gas.


Overall sense that NGN's plan was positively viewed by Ofgem, and that Ofgem was 'fair'.

- Members respected Ofgem's role as regulator, ensuring bills aren't too high and controlling standards.
- There was however some confusion as to whether Ofgem's draft determination ratings were based on previous performance rather than the draft plan.

Some members were nonetheless disappointed by Ofgem's refusal of certain proposals, e.g. no back-up generator funding or new gas connections.

- Members had mixed awareness of the future of heat, although it's likely longstanding panellists would know more than average (Public awareness [DESNZ, Spring 2025](#)).


Themes that jumped out at members included:

 The EV fleet: debating the appropriate pace of switch over.

 Tree planting: questioning why this was NGN's focus rather than addressing broader ecological diversity.

 Cyber resilience: questioning why it needed such a large amount of funding.

 Pipe replacement programme: questioning how long it had been ongoing.

 Biomethane: members unsure as to the environmental harms or benefits associated.

 Bill impact: surprised by "how many fingers were in the pie".

"All they had was outstanding, adequate"

"I was disappointed with the generators, you know... If they don't have those generators as back up to supply us with the gas, then where does that leave the consumer?"

However, members did find the amount of information presented quite overwhelming. As such these topics may be those most familiar to members, which they could best understand and recall.



There is no appetite for network costs to rise further than proposed in the draft plan

While members were aware that the bill impact following the draft determination was not yet settled, they did not understand why it could mean a higher network cost, when Ofgem had disallowed certain proposals



Bill impact

- There was confusion about why Ofgem rejected some proposals, but that the network cost might rise further. NB. Members were not briefed on accelerated depreciation.
- They weren't happy with a further bill increase, beyond NGN's proposal, with the sense of unfairness that "it's always the customer who gets the brunt of it".
- Cynicism that all the benefits of service they receive will be smaller than the bill impact they experience.

Most members felt there was a lack of context and detail – hindering their ability to have an informed response about the draft determination.

- They felt Ofgem's rationale was missing, as well as necessary context to understand the utility or level of ambition of NGN's targets.
- There was also confusion over areas where NGN did not make a specific funding request. This was taken by some to mean NGN hadn't asked for any funding – equating to members as it not being important to NGN.

This and a general mistrust in businesses and the energy sector, led to members feeling there was a potential lack of transparency from NGN.

- There were suspicions that NGN had only included areas where they did well.
- Transparency and honesty are key values for members, so NGN must explain concepts in generous but simple detail to optimise trustworthiness.

"...if they didn't put [a] funding [request] for climate change, what [about] the transition to net zero? It's all related to climate change, right?"

"They say they're going to replace 100 [vehicles] with more environmentally friendly [ones]. But what percentage does 100 vehicles represent? Is it 100 over 1,000 or 100 over 5,000? Because if we are expected to be impressed by that, you can't be impressed by it until you know the rest"

"It still seems... like the focus is on the positive and what they [NGN] have done which has been positive but maybe not being transparent about the things that aren't so good"





The importance of Research & Innovation meanwhile divided opinion, with members unsure as to why NGN was unable to justify this funding request.

**Highest
priority:
Vulnerable
customer
support**

Raising awareness of the Priority Services Register: seen as a top priority.

- Several new members had not heard of this service and one immigrant member believed this would be case for large proportion of immigrants.
- However, members wanted more context on what 113,000 high risk households represented to judge its level of ambition.

**Research &
Innovation;
Carbon
Monoxide
Allowance**

Research & Innovation: divided opinions, being either most or least important.

- Members agreed this area lacked specific detail and actionable strategies.

Carbon Monoxide: seen as higher priority than customer service as it relates to safety.

**Lowest
priority:
Customer
satisfaction**

Customer satisfaction: The low prioritisation of customer service aligns with NGN's 2025. Customer Perception research, potentially driven by the lack of direct customer interaction with NGN for many.

Reaction to the GD3 Plan & Ofgem's offer

Customer complaints

- Questioned how NGN encourages customers to engage in giving feedback.
- Questioned why NGN is only focusing on complaints from PSR customers – sense of 'what about the rest of us?'

Innovation targets

- Seen as vague and lacking specifics, led to questioning of how NGN could have justified their innovation plans to secure funding.

"I think it'd be useful to have some more information on that. Is it the case they didn't justify the amount properly? Or is it because they said they were going to spend 20 million last year and they only actually spent 10? So Ofgem are going, nah, you're not pulling that one again"





However, members linked this to safety and local impact, as well as Net Zero. They were notably surprised at Ofgem's position on New Gas Connections and showed mixed awareness over the future of natural gas.

Highest priority: Pipe replacement programme

Pipe replacement programme & leak detection: Members saw a modernised network and leakage as a priority, not only as an issue of health and safety but also as better for the environment. For others, this was also an issue of local impact – wanting roads to stop being dug up for these purposes. They questioned what a 24% reduction was based on.

Range of interests incl. fleet and biomethane

Transport emission reduction: Members were divided on fleet decarbonisation: some long-standing panellists wondered why more progress had not been made already; others were unsure whether it might be prudent to wait for Electric Vehicle (EV) costs to fall or saw it as wasteful to scrap non-EV's.

Biomethane: if it is cost effective, some members suggested NGN could take a greater role in enabling this e.g. partnership working with local authorities around use of food waste. Others were sceptical about the credentials of biomethane as green / sustainable.

Lowest priority: Land remediation

Land remediation: did not resonate as a priority, potentially due to lower awareness of this environmental process.

Reaction to the GD3 Plan & Ofgem's offer

Members were most notably surprised at **New Gas Connections** and Ofgem's position that it would not longer contribute / socialise the cost. They wanted to know how much it would be for a new connection and felt it to be expensive. They had mixed levels of awareness of a potential switch from natural gas for domestic heat.

"Biggest negatives, the new gas connections. Whereas before you would get an incentive to [connect] and they're no longer doing that."





Views on other initiatives, such as cyber and climate resilience were highly mixed, likely driven by individual awareness, experiences and environmental attitudes.

**Highest
priority: Gas
emergency
response**

Gas emergency response: emerged as the top priority overall. Members viewed it as a critical service, having both safety risks and environmental impact.

**Mixed views
on cyber and
climate
resilience, as
well as pipe
replacement**

Pipe replacement: priority for some, least so for others. Interestingly, this differs from its placement in the Transition to Net Zero outcome area, perhaps demonstrating the relative high importance of gas emergency response.

Cyber resilience: top priority for some; less so for others. Perceptions of cyber resilience may have been impacted by recent media coverage of hacking of large retailers.

Climate resilience: divided opinions with some placing it 2nd, while others ranked it as the lowest priority.

**Lowest
priority:
Supply
interruptions**

Supply interruptions: generally ranked as a mid-low priority, being 3rd / 4th for most. This may be an outcome of supply interruptions being so infrequent that most members have not experienced one, making it less top of mind.

Reaction to the GD3 Plan & Ofgem's offer

- Overall members felt the proposals looked positive and they saw NGN as “doing the right thing”.
- **Some were disappointed investment in generators was disallowed by Ofgem**, leading to queries about the rationale behind this decision and concerns that the need for investment remained.
- **Cyber resilience** was an area of division, with some members struggling to comprehend the need for the level of funding requested.
- **Some expressed disappointment that the pipe replacement work was still ongoing**, while others had concerns about the use of plastic.

“As a child, I remember 40 years ago they were fitting these yellow pipes. You'd thought it would be done by now so... are we getting the full story?”



Members saw Ofgem's draft determination as fair but would have liked information on the rationale behind rejected proposals.



- Some were disappointed by Ofgem's refusal of certain proposals, e.g. no back-up generator funding or new gas connections, indicating mixed awareness of the future role of gas.
- Some areas of the plan were seen as lacking detailed strategies and members questioned how NGN had justified requests to Ofgem (especially where proposals had been rejected).

Members have no appetite for network costs to rise further than in the draft plan



Generally, members prioritised areas for delivery they saw as safety related

- Members consistently prioritised safety-related areas, including emergency gas response and pipe replacement - reinforcing findings from NGN's *2025 Customer Perception Research*.
- Protecting vulnerable customers also emerged as a strong concern.



However, customer satisfaction and supply interruptions didn't jump out as priorities for NGN to act on,



- This may be due to the disconnect of GDN's and customers, or low experience of interruptions.

Climate and cyber resilience divided opinion.

- Media context and personal attitudes were potentially driving this divide e.g. those aware of recent media coverage of cyber hacking, as well as well as differing environmental views.

A perceived lack of detail led to transparency concerns



- Accentuated by a perceived omission of areas with negative feedback, and wider context of consumer distrust in businesses (*2025 Edelman Trust Barometer*).
- NGN needs to emphasise its position on transparency and explain concepts in generous but simple detail, so that members feel well informed.
- Transparency and honesty hold high value for the members – a finding mirrored by NGN's *2025 Customer Perception research*.



7- and 28- day repairs on gas escapes



BLUE MARBLE

Members are impressed with NGN's performance on 7- and 28-day gas escapes

Members recognised NGN's high performance and were surprised to see such a large difference in service levels compared to other regions.

Although not a top-of-mind issue, members agree that gas escapes are important

- **Most had not experienced a gas escape directly**, so the topic is less immediately relatable or top of mind.
- However, **a few had personal experiences** - either in the UK or abroad. For example, one had examples of fires or leaks from home countries with weaker infrastructure where escapes were more common, while another had to manage one as a landlord. These individuals place greater emphasis on the importance of prompt repairs.

When shown current performance levels, members' gut instinct is to be impressed by NGN as a top performer – but quickly caveat this by acknowledging knowledge gaps

- Members **responded positively to NGN being the top performer**, viewing it as a strong and acceptable standard. Several highlighted its voluntary stretch targets as a commendable step.
- Initial views on **acceptable response times were based on gut instinct** with some uncertainty - sometimes aligning with Ofgem's target but shifting after seeing what's achievable in practice.
- There was **uncertainty as to causes of performance variation** across regions, with questions as to why certain areas lag and surprise at NGN doing well despite a dispersed service area.
- **A few understood the complexities** - noting, for example, that London's dense population and infrastructure (e.g. Tube stations) poses access challenges, while rural areas like Wales may face logistical hurdles of their own.

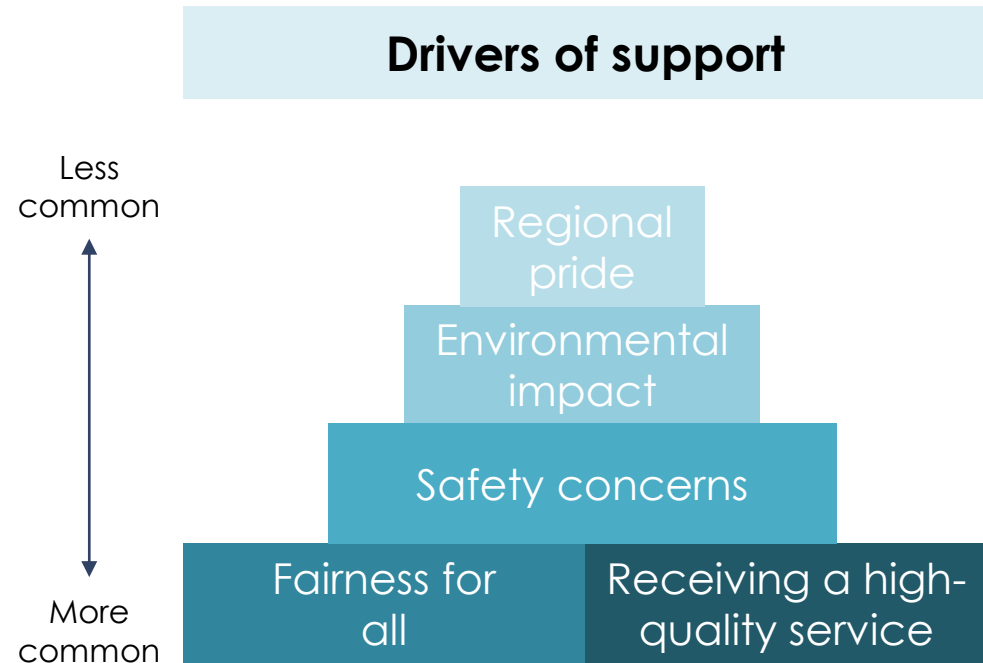
"I think I've only really thought about it... in terms of if you smell gas in your house... I hadn't really thought about the wider network of it."

"It depends, because the population density and the density of leaks is probably higher in the South, and the East traditionally gets a lot less funding generally, which is why I imagine their figures are the lowest."



There is support for all networks to have 7- and 28-day targets

The concept of a national target is intuitively appealing to members. However: uncertainty about causes of performance variation, scepticism, and a preference for proportional systems temper support.



Inclusive panel insight:

A few express pride in their region's performance and empathise with the idea of others receiving a lower standard of service. This empathy reinforces their support for efforts to level up service quality nationwide.

- **Members unanimously support the idea of raising standards across all networks, with many surprised that no national target currently exists and that progress to date has been voluntary.** Their support is primarily driven by a desire for fairness and consistently high-quality service, particularly given the monopoly nature of GDNs. Safety is also front of mind, while environmental impact tends to feature only when specifically prompted - though a more climate-conscious minority view it as equally critical.
- **While the concept of a national target is broadly endorsed, some members are hesitant to fully commit due to gaps in their knowledge.** Questions around the root causes of performance disparity, such as population density or geography, create uncertainty and this affects members' confidence in endorsing the idea.
- **A degree of cynicism emerged,** with some questioning NGN's motives for proposing the target and seeing it as Ofgem's role.
- **Overall, any uncertainty or scepticism did not undermine the idea of nationwide targets, but it did prompt some to propose alternative approaches they see as fairer,** such as proportional targets based on incremental improvement or bespoke targets adjusted to each network's context.
- **There were some suggestions for targets to be reviewed year on year,** not set as a national target for 5 years, and to keep pushing national performance up continually.

After showing current performance levels and NGN's voluntary stretch targets, we presented members with NGN's proposed national target for gas escapes, followed by the response from Ofgem.

Members were shown the following summaries...

NGN's proposed national target

- 89% of outstanding escapes in 7 days
- 98% of outstanding escapes in 28 days
- A penalty or reward based on performance

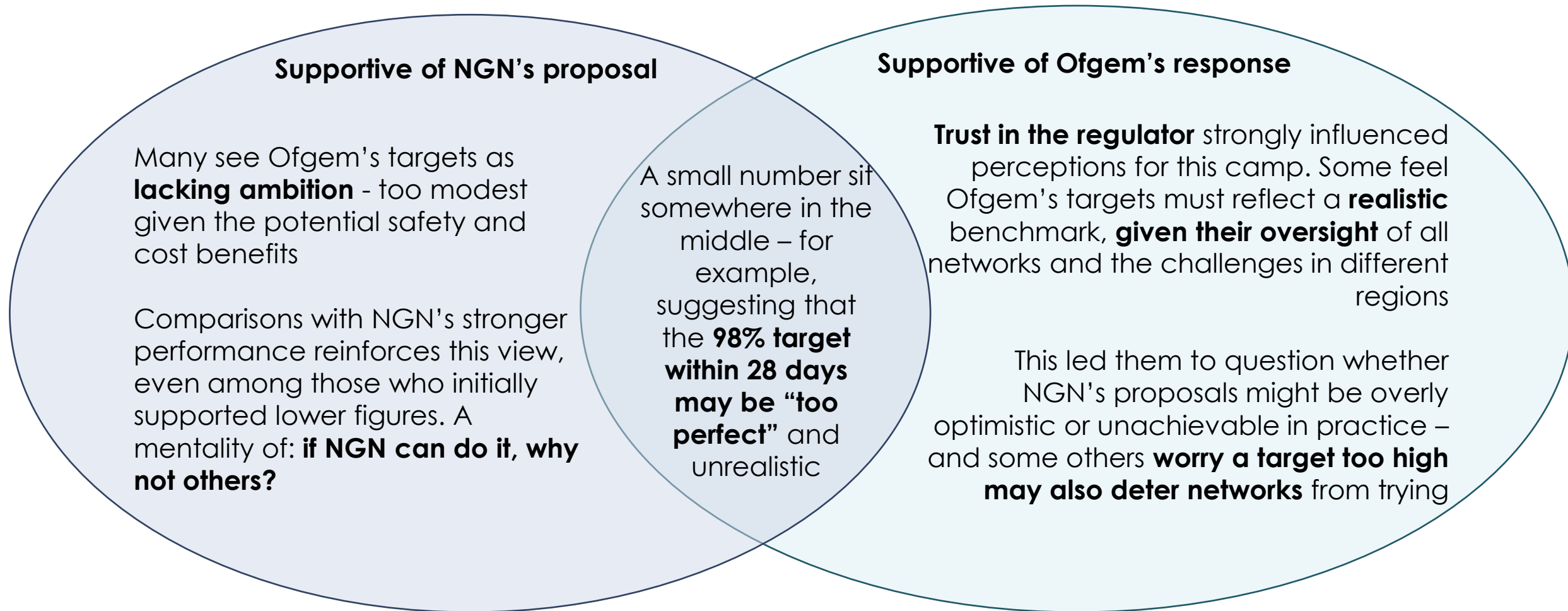


Ofgem's response to the target

- 75% of repairs in 7 days
- 90% of repairs in 28 days
- Capped penalty for missing target (no reward for meeting or doing better)



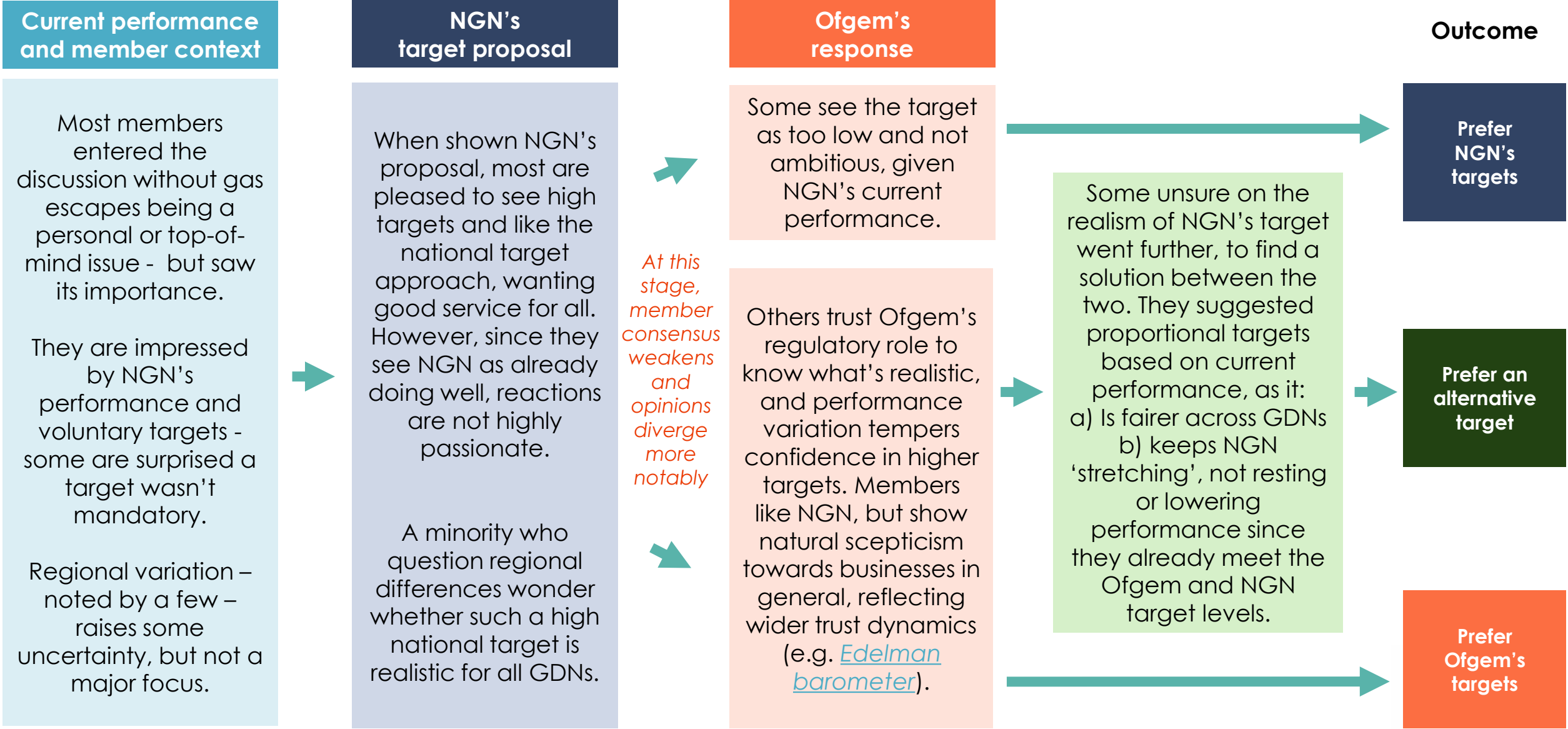
Members are split on the right target levels for 7- and 28-day repairs, but all agree a strong standard is needed - one that balances ambition with realism, informed by regulator insight and designed to stretch all networks.



A sizeable minority pushes for **proportional targets** that stretch all GDNs (based on a % increase). They worry that without this, high performers like NGN may become complacent. Even a 1% drop from current performance, while still meeting targets, could translate into thousands of unrepaired leaks, **risking decline masked as success.**

Opinions on the 7- and 28-day target level developed throughout the deliberative process

Members were initially aligned on current performance and having a national target, impressed by NGN's success - but Ofgem's proposal prompted some to infer it must be more realistic and to consider tailored targets.



Most members support penalties for missed targets, but capped penalties are seen by many as lacking sufficient financial impact to drive change.



Overall, members do not question the concept of having some form of penalty for networks for missing this target...

Most accept the idea of penalties for networks missing the national target, with little pushback or deeper interrogation. There was a sense of automatic acceptance, possibly due to familiarity with penalties in other utility sectors, such as water.

Only a few are concerned that penalties could reduce funds available for investment in the service.

...Although penalties received less interrogation at an overall level than the reward element and are generally accepted, there are concerns about the specifics

For many: Concerns around 'capping' penalties

- Members fear caps limit the incentive to improve and allow companies to pay their way out of making real change (sometimes mentioned spontaneously), especially troubling for those with perceptions of similar behaviour in the water sector.
- Penalties sometimes reveal contradictions in the strength of members' feelings e.g. feel that Ofgem's target are realistic (so are softer on the % target) yet believe penalties should be severe enough to "hurt" companies and motivate stretch - perhaps driven by a scepticism that networks would act in consumer interest otherwise.
- A few question the value of capped penalties for consumers – arguing that if the bill reduction is minimal, they see little compensation while still receiving a poorer service.

For a few: Wanting a balanced approach that recognises effort

- Some take a less punitive stance, feeling that networks making genuine progress should not be penalised, arguing it would be demotivating if improvement wasn't acknowledged. This tied into support for proportional targets (aka networks meeting a certain percentage increase), based on how close or far they were from meeting them.
- Some also believe that penalties should be considered on a case-by-case basis, recognising that not all companies failing to meet targets would do so without reason. This came from those who recognise potential struggles with workforce numbers, landscapes etc.

This is largely due to concern about personal financial impact and beliefs that monopolies should provide a high level of service as standard.



Those in favour of a reward generally approach the idea from a human psychology perspective

- Many view positive reinforcement as more effective than penalties, often referencing familiar behavioural concepts like “rewarding a dog with a treat” or the “carrot vs. stick” approach.
- Some see rewards as especially important if penalties remained capped.
- This pro-reward stance aligns with members who are willing to pay slightly more for higher service quality. They understand the reward payment mechanism and recognised its value.



However, not everyone is onboard - mostly driven by frustrations with customers paying more and seeing improvements as a basic expectation (especially in a monopoly context)

- Some are not opposed to rewards in principle but feel strongly they should not be funded through customer bills. They believe shareholders or government should bear the cost. A few softened their view if the amount added to bills would be minimal, but scepticism remained.
- A few questioned why a reward was needed at all - arguing that preventing gas escapes should already be in GDNs' interest, as it saves money and maintains their assets. They argue that NGN are already performing well voluntarily, suggesting it must already be beneficial to do so.
- Others see this simply as GDNs doing their job, opposing financial rewards for meeting core responsibilities. This group prefers a penalty-only model, particularly given GDNs' monopoly status, and some feel rewards should only apply if performance went significantly above target.



A mixed reception to the idea of a reward, with members often divided on the best approach



Consensus level: High

Driven by fairness, safety and service quality, members supported the principle of a regulated target.

- However, uncertainty around regional disparities led many to caveat their judgement – or, for those more focused on regional differences, to favour proportional, rather than uniform targets



Consensus level: Low

Members want networks to improve performance, but were divided on which target level to back

- Some favour NGN's higher targets, wanting all GDNs to match strong existing performance, while others' trust in the regulator to have oversight and be realistic persuaded them that Ofgem's may be a more balanced, achievable goal across regions
- Proportional progress remains a consistent theme – with calls for all networks, including high performers, to be fairly and consistently challenged.



Consensus level: Medium

Penalties are broadly accepted but must reflect effort, not just outcomes.

- Members welcome penalties as a motivator but criticise the capped approach as too rigid.
- Many fear GDNs will pay the fine and not improve
- A proportional or case-by-case system is seen as fairer, especially for those making visible effort – as well as to more severely punish those who do not.



Consensus level: Low

Rewards sparked debate, especially over basic service expectations and customer bill impact.

- Some feel rewarding baseline service is unjustified, particularly if customer bills rise as a result
- Supporters value positive reinforcement if it clearly drives better outcomes and service quality – understanding the link between the two.

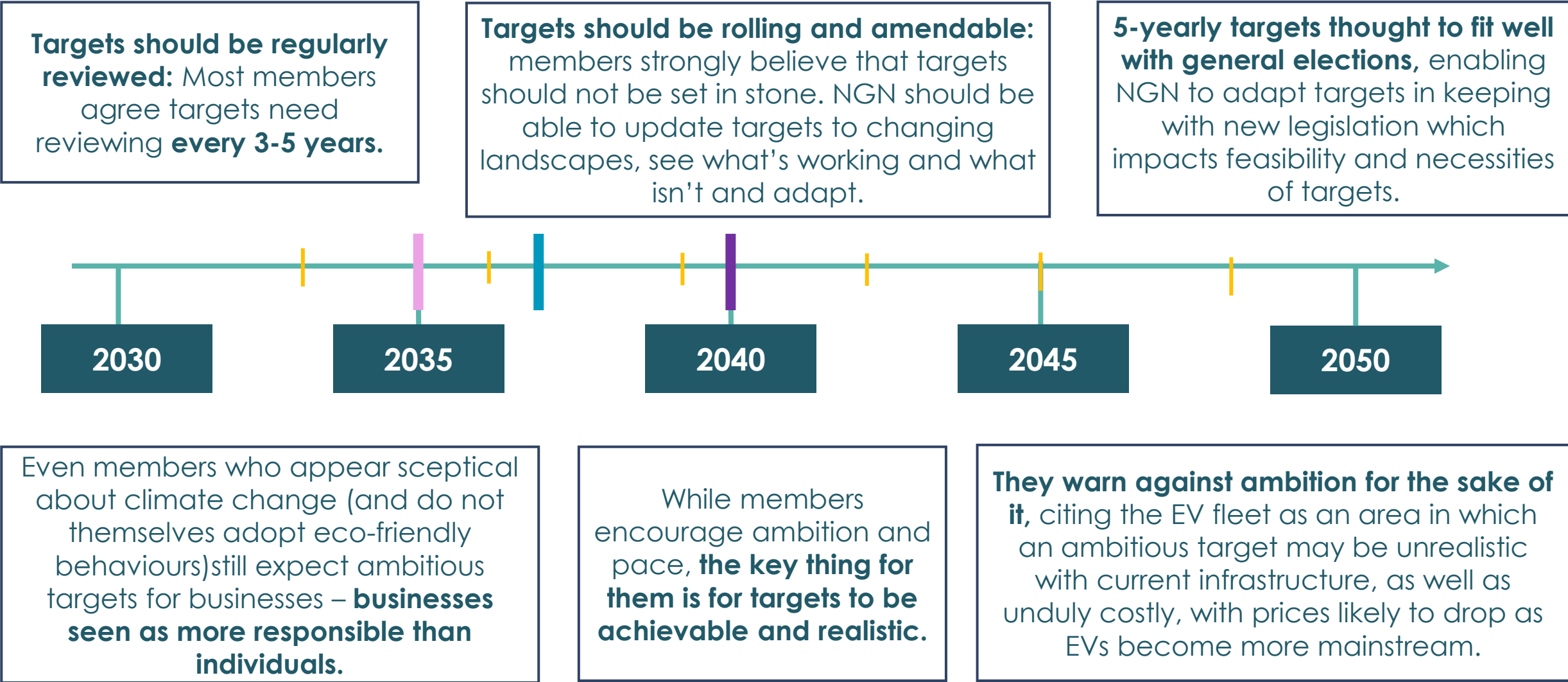


People and planet strategy



BLUE MARBLE

They believe in rolling targets that are realistic and trackable, regularly reviewed and amended as necessary.



Members believe an 80% waste reduction medium-term target is feasible

Members disagree on the feasibility of going paperless but agree it should be aimed for.

Target set
for 2035
or 2040

Medium-
term target
should be
80% waste
reduction



Going paperless: There were mixed views on achievability, with a generational divide.

- Younger members suggest technological alternatives to paper (e.g. tablets) mean it is highly feasible and should be achieved as the medium-term target rather than 2050.
 - Suggestion that it should go further – encouraging suppliers to also go paperless.
- Older members however argue employees are attached to writing notes down on paper.
- Others believe the office environment could be paperless, but that paper will always be necessary, e.g. correspondence with vulnerable customers who were digitally disengaged.

To achieve the 80% waste reduction target, members believe NGN needs to:



- Focus on **reusing and repairing**, rather than replacing, any furniture or equipment.
- **Donate** old furniture and equipment to charities.
- **Buy recyclable** and eco-friendly products (including second hand).



- **Avoid energy wastage, by using LED lightbulbs on timers or offsetting work for AI use** (which they believe has the potential to both reduce and produce waste).
 - Beyond energy, people's time was brought up as a waste product.

Tracking progress & accountability: Members want NGN to undergo external and internal reviews, with sites audited for their paper use and waste levels. **Personal vs company accountability was evoked:** a suggestion that employees could not bring lunch to work in single-use plastic was challenged by members arguing this is individual choice and beyond the role of the company.



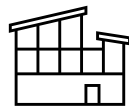
Members are more divided as to the approach to the EV fleet or working from home.

Target:
rolling
targets
every 5
years or
less

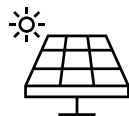


Fleet: Members are interested in the 10-vehicle pilot results and suggest next steps: reduce fleet or extend vehicle life; explore alternative fuels; support car-sharing. The group questioned whether company cars were needed - if so, to have full electric rather than hybrid.

- Across other discussions, members had shown less positivity, reflecting their concern about transitioning to EVs and possible acceptance of climate sceptic messaging: that getting rid of non-EVs is wasteful, that building EVs has a high environmental impact, that it will be cheaper to wait and swap to EVs at a later date, that only the privileged can swap. (In [wider research](#) we see that scandals e.g. diesel, underpin fear that technology labelled as environmentally friendly is misleading).



Buildings emissions: increase NGN building energy efficiency asap, ideally by 2030.



Solar Panels: install sufficient panels to cover all of NGN's use, or to generate extra electricity which could be put back into the grid or stored on site using batteries.



Working from home: Members debated that while this could reduce emissions, there may be negative impacts on staff learning, mental health etc. Some suggest that staff could be encouraged to use more public transport - but others feel that local public transport is inadequate.

"There are two aspects to it: one is you generate it and put it into the grid. The other one is you generate it and store it on site and use it here."

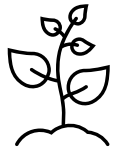
"The thing that the Youth Forum came up with, which I thought was really good, was NGN auditing their suppliers."

Tracking progress & accountability: Members want NGN to measure savings and reductions, publish these, and they agree with the YIC that external auditing processes are key. For example: publish EPC/ESOS building efficiency ratings. They agree they'd want external verification of NGN achieving Net Zero. They like the idea of supplier audits.



Members identified a series of simple and community-led actions to deliver visible benefits to the local environment.

Target:
Have
50% of
land
reach
net
positive
by 2040



Enhance biodiversity: Planting more **wildflowers** is favoured as a cost-effective way to benefit the pollinators and biodiversity.



Improve infrastructure: Members support the YIC recommendation of installing more **green walls & green roofs** where feasible.

Local involvement: Engage **local residents, schools, environmental and volunteer groups** in activities such as putting up bird nests.

- Some also suggest placing focus on the future generations through **educating children** about protecting plants and wildlife.



Collaboration: Partnering with other companies who own large areas of land (e.g. Yorkshire Water) to help NGN effectively manage their land.

- Some proposed the idea of a friendly competition between providers.



Orientation: Put up **signage** to educate and manage public expectations of the appearances of the land (e.g. signalling intentional 'letting be' to support pollinators, rather than it seeming neglected).

"I think it'd be obvious in the community [to see improvements]."

Tracking progress & accountability: To measure success, specialists should be employed to survey sites for any environmental problems. NGN should share progress by sending out newsletters and email updates, incorporating simple charts to clearly communicate improvements. Sharing with local media would boost visibility, while some improvements in this area would be naturally visible for the community to see.



Members want NGN to hold suppliers to high standards but also take into consideration the size of the supplier company.

Target:
Have
medium-
term target
reached by
2040 and
maintained
until 2050



A formal verification process: This was identified as a priority action, as currently NGN partners can self-declare as meeting NGN's standards. Members don't feel this is sufficient and would like NGN to have a process in place for suppliers to verify their compliance, including providing documentation (e.g. anti-modern slavery policies) for NGN to review.



Tailored expectation by size: Members recognise that smaller suppliers may not have formal policies in place, in which case the framework should outline what is acceptable for SMEs to provide vs larger companies.



Support SMEs: If smaller companies face challenges meeting standards, members would like to see NGN provide support and training to help them improve overtime.



Trusted supplier list: To streamline future partnership processes, members would like to see NGN's suppliers added to a 'trusted list' after relevant checks are completed, which would reduce the need for repeated checks.

"I think one of the targets should be giving all your current suppliers targets themselves, say by 2030. You need to achieve all these to stay on the supplier list."



Tracking progress & accountability: Members want NGN to carry out regular audits to ensure their suppliers continue to meet the required standards. The trusted supplier list could also serve as a metric to track how many suppliers are officially verified to meet sustainability standards.





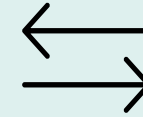
Members feel 2035-2040 is a sensible timeframe for a medium-term target.

However, most prefer to see NGN set frequent interim targets every few years to optimise tracking and transparency, as well as allowing for change and evolution of actions.



Members want targets to be achieved at pace and efficiently, but caution that targets should not be overly ambitious for ambition's sake

Aligned with their views on the Business Plan and climate change, they see a role for NGN as a business to lead on climate action. However, they caution realism and a steady evolution fitting in with evolving wider transitions e.g. cautious transition to an EV fleet.



Members see targets as amendable, essential for adapting to new legislation and changes to wider contexts

If changes to targets are transparent and justified, members encourage this flexibility which they see as necessary.



To ensure accountability, members wanted

- Targets to be reviewed by both internal and external sources
- Regular auditing of sites or suppliers
- Publicising of reports, shared via email and newsletters
- Reports to be accessible and comprehensible to the general public

As in wider public research, members see scrutiny and transparency as important in delivering accountability ([CCW, Better Outcomes 2025](#)).





BLUE MARBLE

www.bluemarbleresearch.co.uk

