

Citizen Panel

Wave 4 report: Summer 2026

Customer insight on futureproofing skills and
intergenerational fairness



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01

Background and methodology

Navigator



Research background

Objectives

Skills, education strategy and community outreach

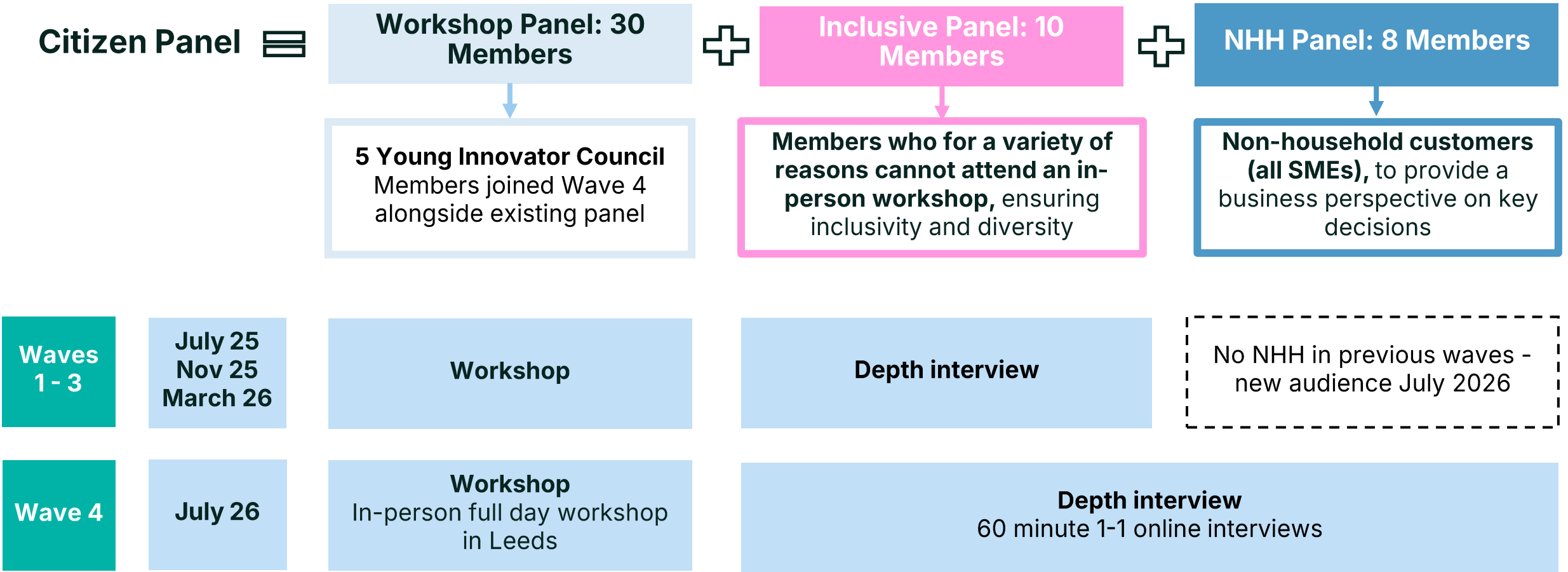
1. Give Members an understanding of the net zero skills, jobs and workforce transition context; introduce them to NGN's skills and outreach activities and social mobility targets.
2. Understand Member hopes and concerns around transition skills and workforce in their region and communities, exploring what drives views.
3. Gain insight into Member perception of:
 - a. The Green Academy
 - b. NGN's community outreach programme and the targeted approach

Intergenerational fairness

1. Give Members further understanding of GD3 investment, and what this means for bill-payers today and in the future; in the context of uncertain energy transition policy.
2. Deliberate on the issue of who pays for what and when:
 - a. Explore what 'intergenerational fairness' means to Members
 - b. Encourage sharing of views across the panels, with Members of the Young Innovator's Council joining the session.
3. Develop intergenerational fairness principles to influence early thinking for GD4 investment and network costs.



Methodology



Findings in this document report on the Citizen Panel as a whole, only distinguishing Inclusive and NHH Panel views where they differ:



02

Key takeaways



Futureproofing skills – key takeaways

1. Members appreciate the job market today is challenging, and support the idea of NGN increasing employment by upskilling their workforce and through their outreach programme.
2. They have mixed views on the targeted approach to outreach. In principle they like the idea of supporting those in deprived areas, but question whether the impact of the outreach will be optimal in these areas, as well as concerns about other areas of deprivation beyond the targeted zones being neglected.
3. Energy transition policy uncertainty / scepticism over declining role of natural gas, mean Members are sceptical / unclear about 'green' jobs and as such a 'green' academy. This is also driven by mistrust of net zero policies or concerns of greenwashing.
4. As such, Members think the idea of the Green Academy should either be paused, or evolve into supporting both workforce and wider community with training and career pathways, focusing on transferable and flexible skills which they believe are key to sustainable employment in the uncertain energy climate and future employment landscape.

Implications for NGN

- Members value programmes that make an impact. It is important that the infrastructure is in place in order to make an outreach programme meaningful. This means ensuring the 'green academy' is supported by qualifications, or outreach programmes are designed to offer real opportunities in areas of deprivation.
- Branding a programme or academy as 'green' is no longer seen as a futureproof or desirable direction for skills. 'Green' is a political word and represents uncertainty or even dishonesty. Instead, programmes that support transferable skills and futureproofed careers are received more positively.

Intergenerational fairness – key takeaways

1. Members agreed that intergenerational fairness is about recognising the challenges faced at different life stages and ensuring no generation carries an unfair burden. Underpinning this is a broadly shared values set – of kindness, respect, equal opportunities and accessibility.
2. However, there was less agreement between Members on how intergenerational fairness can be achieved in the context of repaying investments over time. While there was an overall preference for option 2 (spreading the cost of investments over today and the future), there is a lot of complexity and nuance to how customers feel about the intergenerational fairness of different billing scenarios:
 - Firstly, current cost-of-living pressures mean that many Members feel unable to shoulder the burden of increased payments now, despite them understanding that it is unfair to put it all on future generations.
 - Secondly, the uncertainty around the future of gas networks and energy transition means Members struggled to commit to any of the riskier options while so much is still unknown.
 - Finally, the historic approach to repaying investment (keeping bills low now) means that changing this to a more front-loaded or balanced repayment might result in today's customers 'double paying' for past and present investments, which feels unfair.

Implications for NGN

- This was a principles-based discussion and difficult for Members to give an informed choice without knowing the scale of the financial impact. When NGN are able to develop scenarios that meaningfully show the bill impact of different options, this topic should be revisited with customers. We'd recommend we ask for participant bills in advance, so we can model options indicatively for research participants.
- Members are keen for NGN to approach changes to bills and repaying investments with transparency, empathy, in partnership with customers and ensuring financially vulnerable customers are safeguarded.

03

Consumer context

Rising pressures are hardening attitudes

Members feel increasingly financially stretched and continue to question who should bear the cost of the energy transition, while trust in institutions continues to decline.

Bills are forcing impossible trade-offs, eroding trust in the wider system

- With energy prices rising in July, Members are running out of ways to save money and feel unable to fight back against bill increases.
- This sits against a backdrop of low trust in government, reinforcing scepticism about whether institutions will deliver the transition fairly or protect households from rising costs.*
- Trust in energy companies is similarly thin, with a sense that companies 'don't care' about customers, routinely breaking promises on future savings and prioritising profit over bill prices.

Net zero policies are increasingly associated with worsening the cost of living

- Despite widespread concern about climate change, Members place much of the responsibility for delivering net zero on businesses rather than individual households, particularly while finances are stretched.
- Workshop Members attach blame to policies funding renewables as causing bill rises, rather than solving them, reflecting wider concern about the personal cost of policies aimed at delivering the net zero transition.
- The most net zero-sceptical Members have extended their negativity towards government energy policy onto NGN in this research wave.

The summer heatwaves caught people by surprise, with real life impacts

- Many believe society is at a 'point of no return' with climate change – that the UK acting alone on net zero is futile and the trajectory towards further climate change is unavoidable. This fatalism weakens willingness to pay for investment in green transition.

¹⁰ *NB: fieldwork took place in the weeks prior to Andy Burnham's appointment as Prime Minister

Financial pressures create a 'backs to the wall' mindset

Households and businesses increasingly have to focus on protecting their own position.

Existing vulnerabilities and low financial resilience can make new cost pressures particularly difficult to absorb

- The Inclusive Panel includes Members across a range of financial circumstances. However, for those with less financial headroom, the combination of existing vulnerabilities and rising costs can leave little capacity to cope with further pressures.
- The recent heatwave has had a significant impact on some Members, worsening health conditions, and in some cases affecting their ability to work – e.g. health condition flare ups.
- Keeping homes cool has become an additional pressure, with some running fans continuously and beginning to worry about the impact of the July price cap on the cost of this.
- Alongside rising supermarket prices, council tax and housing costs, increasing energy bills mean many are constantly thinking about how they will manage financially. Few are confident they can absorb further increases in costs.

"I'm always thinking about the bills... it's a constant stress all the time."

Inclusive Panel Member

Staying afloat takes priority over future investment for NHH Members

- Rising overheads, employer's National Insurance contributions and energy bills have eroded any cushion, with owners putting personal money into the business or absorbing supplier surcharges just to stay afloat.
- Energy transition costs are viewed through this lens – seen as another unavoidable squeeze on their business, rather than an investment for the future.
- With no room to pass cost increases on, NHH Members reject the idea that customers (both HH and NHH) can shoulder further bill increases to fund energy transition.
- Members want NGN to play an active, visible role in the energy transition. NGN need to provide tailored advice for different business sectors, and ideally help with transition costs through grants for low-carbon technologies.

"There's such uncertainty in policy... if you're going to go with something, you need it all mapped out with exactly what you're hoping to do."

Non-household Panel Member

Customers struggle to see a positive future

Members' general outlook is increasingly defined by economic pessimism and climate resignation, with immediate financial concerns outweighing longer-term needs for society.

- **Economic and political uncertainty has created a near-universal sense of pessimism.** Members see the future as unpredictable, with little confidence that political leaders or institutions, including utility companies, will improve their situation.
- **Many Members feel they have little control over their future.** Whether household finances, politics or climate change, there is a recurring sense that decisions are made *to* them rather than *with* them. This lack of agency is a driver of the current disengagement with both government and energy companies, which reinforces their focus on coping with the present rather than planning for the future.
- **Concern for younger generations remains one of the few issues that cuts through the wider pessimism.** Worries about housing affordability, insecure employment and the cost of living evoke stronger emotional responses across groups than the need to act on climate change. Framing investment decisions around protecting the next generation and the economic future of the UK is likely to resonate more than arguments centred on net zero alone.



Ongoing financial pressures are reshaping how Members think about tomorrow. Immediate affordability concerns are crowding out longer-term priorities, meaning their support for future investment increasingly depends on demonstrating tangible benefits for households today.

"We have the most expensive energy in the world, which is toxic... even just staying stable would be nice for a few months."

Workshop Panel Member

04

Skills, educational outreach, and the Green Academy

Context

This session aimed to gain insight into Members' perceptions of NGN's educational outreach programme and Green Academy to inform future approaches

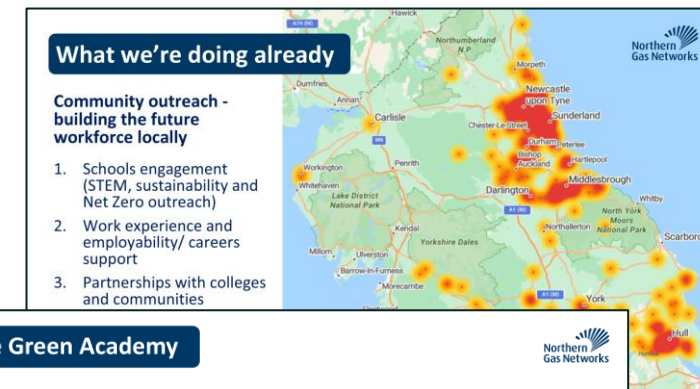
Workshop and NHH panel Members discussed:

The **current job market**, particularly skills and careers options for young people

NGN's **community outreach programme** and the **targeted focus** on high-deprivation areas

NGN's proposition to create a **Green Academy** to build 'green' skills by providing structured pathways through apprenticeships and new green qualifications

Key information presented to the panel to inform meaningful discussion



The Green Academy

The idea:

- Building future skills
- Proposed NGN training academy
- Focus on hydrogen + Net Zero skills
- Provide structured pathways through accredited qualifications, apprenticeships & new green qualifications
- For both new entrants and existing workforce
- Developed with industry and education partners

Trade-offs and Uncertainty

There are choices to make about the Green Academy

Benefits:

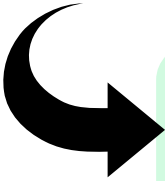
- Future-ready workforce
- More local opportunities
- Fairer access

Challenges:

- Cost to customers
- Uncertainty in policy
- No official "green" qualifications
- Risk of uneven impact

Members recognise challenges with the job market

- **Insufficient opportunities for young people** to gain work experience
- **Competition between overly qualified candidates** due to limited number of opportunities
- **Industries closing down**, driving high unemployment in certain areas
- **Jobs no longer feel 'for life'** - the most secure jobs are practical, hands-on trades with transferable skills
- **University feels less valuable than apprenticeships**, although apprenticeships seen as rare



Despite this, there is **intergenerational tension**. Some Members have limited empathy towards the challenges young people face, due to a perceived lack of work ethic



Consider that communities care strongly about plans for futureproofing due to the impacts on employment

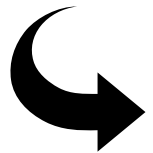


Members are sceptical of 'green' jobs

Whilst all new job opportunities are helpful, there is doubt about the need for 'green' jobs specifically

'Green' jobs are perceived to be risky as...

- Members struggle to envision what these jobs look like
- Therefore, they don't see a clear future for this type of career
- The lack of a clear 'green' policy direction also raises concerns about the security of these types of jobs



Scepticism appears to be rooted in a general distrust in institutions and government policy – it's not just those who are anti-net zero who are sceptical.



Some young Members (including YIC attendees) are more optimistic about 'green' jobs, seeing this as a potentially attractive career.



Members are generally positive about NGN's outreach

Education outreach is useful for fostering an interest in STEM amongst children

Conducting outreach with younger children is beneficial

- Members like the idea of engaging children at a young age to create an early interest in STEM. Working with children as early as possible could motivate some to stay in education
- One Member's daughter experienced a similar engagement event while at school and believed it was driver of them now having career in STEM
- Some suggest the programme should also target older pupils, especially Year 12 and 13, when career choices feel more immediate

What do Members want from outreach?

1. **Practical** approach, providing young people with a clear pathway into work
2. **Fun and entertaining** to generate interest (e.g. suggestions of competitions and gamification)
3. **General focus on STEM**, avoiding niche focuses (on 'green' jobs for example) whilst there is policy uncertainty
4. **Potential earnings and lifestyles** of career options highlighted to motivate young people



NHH Members broadly welcome the education outreach programme creating opportunities for young people. However, there are questions about whether outreach would genuinely appeal to, and reach, target groups. For example, there are suggestions of going beyond schools to youth clubs, care institutions and probation services to engage underrepresented groups.

"I would extend that personally as well to reaching out to social care institutions...youth clubs, things like that...because I think they're the kind of people that need to know about these opportunities. And that's the way that you are going to make a meaningful difference."

Non-household Panel Member

NGN's targeted approach to outreach divides opinions

Those in favour

- ✓ Like idea of reducing inequality, seeing the cycle broken
- ✓ Trust that NGN have used data to identify target areas and agree with principles of targeted investment
- ✓ Increased support from those who live in the areas and could see they are 'forgotten'. Sense that places like Leeds do get enough investment and it's time for smaller places to get the focus

"No, I think it's good. I think they deserve it. I think they should have the help." - Workshop Panel Member



Suggested compromise:



- **Younger age groups:** broader outreach to drive interest
- **Older age groups:** outreach on careers and STEM targeted at a range of underrepresented groups
- **Career pathways:** ensure opportunities are open to all, regardless of involvement in outreach

Those against

- ✗ Think everyone should have opportunity, leading to concerns about overlooking other deprived places
- ✗ Distrust that the deprived areas will take up opportunities – so fear opportunities will be wasted. Perception of this likely driven by views on young people's work ethic as well as a 'survival attitude' where everyone is struggling, and there's less mental space for charitable focus
- ✗ Some query whether this project is a social project, or a business decision, not believing that a social mission is within the role and remit of NGN. They argue NGN should focus on where they can achieve the most skilled workforce
- ✗ Some question how much impact it really has: *"But it sounds like it's just an hour's presentation once a term"*. This is used as an argument against targeting, because they argue if it's in deprived area it will need significantly more engagement to make any sort of difference

"A box-ticking exercise." - Workshop Panel Member

Who is in favour of the targeted approach?

A majority of Members agree that NGN should undertake a targeted approach to outreach, with location somewhat shaping opposing views

Regional difference

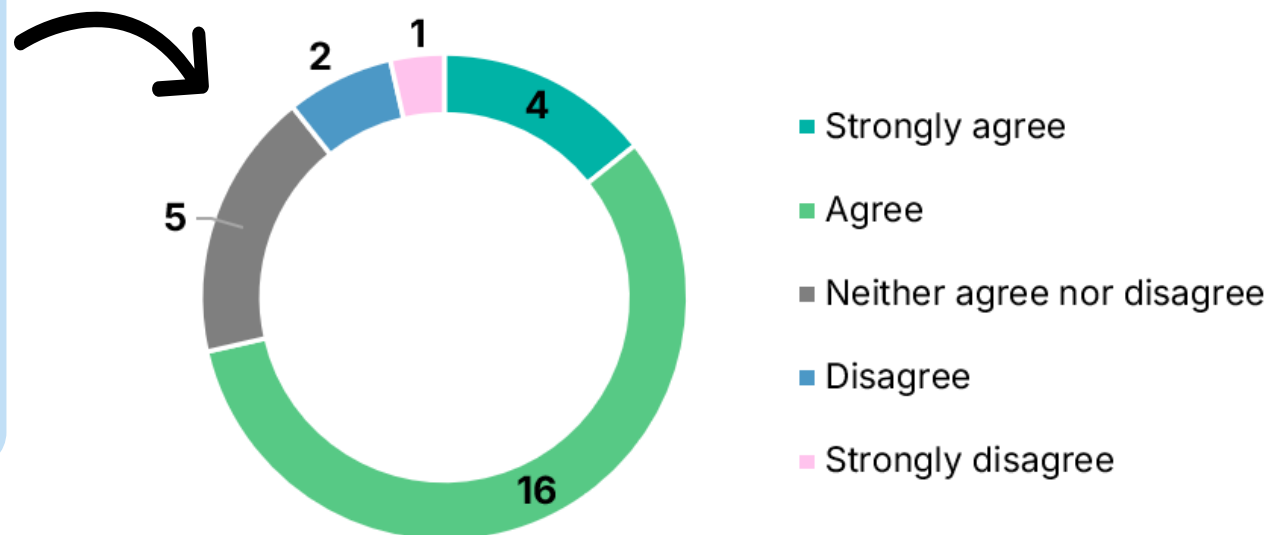
Those who do not agree with the approach are more likely to live in areas that would not be targeted for outreach (e.g. West Yorkshire). However, it should be noted that some Members from these areas still support this targeted approach, as they feel that their area receives sufficient investment.

The regional split also came through in interviews with the NHH panel, with those not located in target areas questioning the fairness of this approach.

"Why should the kids in school in the Yorkshire area, Leeds area, or in all these other areas suffer because they've decided to focus their attention on one area?"

Non-household Panel Member

Agreement with targeted outreach approach



Base: 28 (Workshop members)

When it comes to the Green Academy, Members support an approach which focuses on upskilling and career pathways

As we saw in the previous wave of the panel, job creation and upskilling motivates Members

- The ability to create jobs and develop workforce skills is seen as the most important benefit of the Academy
- This viewpoint is mainly driven by the current economic context, linked to employment challenges in the region

Therefore, there is support for developing a broad range of engineering skills

- This is especially important in the context of NGN's projected workforce shortages
- Developing transferable skills also resonates with the transience of today's job market, equipping people to move careers if things change

Wave 3 findings

In the previous wave, both pro- and anti-net zero Members saw job creation as the main benefit of the East Coast Hydrogen Project, suggesting that this is an overarching motivator for the panel.

"I think it's just a really good thing in general because of the lack of training and stuff that's around...not necessarily because it's green, but because it helps people get a foot into careers"

Workshop Panel Member

"They need to be upskilling the people they have and making sure that their workforce are ready."

Non-household Panel Member

However, the 'green' aspect of The Green Academy causes objections

Both those who support and those who oppose net zero are against using the term 'green' when it comes to the Green Academy



Pro-net zero

Some of those who are supportive of net zero do not believe the Green Academy is truly green, associating this with 'green-washing'. This group see the Academy as a tick-box exercise, rather than a genuine attempt to be environmentally sustainable.

*"Without the green. They're just selling it.
It's a marketing ploy."*

Workshop Panel Member



Anti-net zero

These Members are unsupportive of the 'green' element as they are opposed to the government's net zero policies, and do not feel that the transition is a priority. Some are sceptical that that reliance on gas and the gas network will reduce; others are fearful of wasting resources due to policy uncertainty.



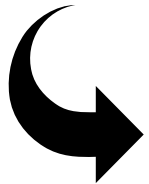
NHH Members

Generally indifferent to the 'green' aspect. Coming from a business perspective, they see the value of future-proofing the workforce to anticipate changes. As a business, their focus is on preparing for a likely shift, even if they care about the environment on a personal level.

Members are concerned about the uncertainty around the energy transition

As a result, they believe the Green Academy should either be paused until there is greater certainty, or it should be broadened out to wider, transferable skills

- Members worry about **government priorities changing**, as well as AI affecting future job opportunities
- Therefore, they feel there is **too much uncertainty to back an Academy that is solely focused on green methods**, as it impossible to know what methods to commit to



In the previous wave, Members were similarly concerned about resources being wasted if the East Coast Hydrogen Project was cancelled due to policy shifts - which affected their support for the project.

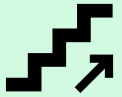


NHH Members were more likely to want the programme to "continue in some capacity", as they recognise the value of workforce futureproofing



The ideal Green Academy: Aims

When designing their ideal Academy, Members want the programme to focus both on future-proofing the existing workforce and creating opportunities for disadvantaged communities



Build on outreach

- Members perceive the Green Academy as linked to educational outreach, and expect it to have a **wider community impact**
- Connect to the outreach programme, enabling **natural progression** to the skills programme
- Have a **clear structure of transition** to ensure the programmes cohere effectively



Upskill

- Teach **flexible, transferable skills** to optimise employability across changing policies
- **Widen skill sets and knowledge** of emerging methods and technologies
- Train up-to-date engineering skills to **future-proof** the workforce

"I think the qualifications thing is probably a key thing because it's about providing them with the necessary and transferable skills."

Non-household Panel Member



Create pathways

- **Guarantee work opportunities** at the end of training programme
- Focus on **disadvantaged groups** – getting people experiencing deprivation and young people into employment

"Create work for people."

Workshop Panel Member

The ideal Green Academy: What does it look like?

Members favour a risk-averse approach that builds practical, transferable skills until there is greater 'green' policy certainty

Focus on practical skills

- Minimise risk around policy uncertainty by **focusing on 'standard' engineering skills**, with **bolt-on modules** on environmental futureproofing
- Concentrate on practical, hands-on experience, which Members believe traditional education lacks
- Ensure this is developed in a way so that it **can switch into a formal 'academy'** focused on green issues if policy direction firms up

Partner with colleges

- Base training programme in colleges. **NGN engineers and experts consulted** on course design, along with other industry stakeholders
- Create a set of **'utilities environmental futures' modules** which can be part of a general engineering programme. Ensure this results in **qualifications**
- **NHH Members** also suggest the possibility of funding university courses

Generate interest

- Target **promotion at young people** (especially in deprived areas)
- Ideas for achieving this include social media campaigns, clear incentives, community events and video games

"There are a lot of content creators who talk about [stuff] for young people. I think they should talk to the content creators to promote it for them, because a lot of young people my age, they look up to content creators."

YIC Panel Member

The ideal Green Academy: Who is it for?

Members believe the Green Academy should be inclusive – open to underrepresented groups without excluding anyone



Open to all

- Members believe that **everyone should have a fair chance** of application
- However, there is support for **quotas and targets for underrepresented groups**, so that a diverse range of people participate

"Everybody should have the same opportunities."

Workshop Panel Member



Consider age needs

- The programme should **support young people** who face limited employment opportunities
- But it also needs to enable **older people to retrain and upskill** (especially those in the existing workforce). Members think older people have a lot to offer in the skills transition

"Just don't leave other people behind just because they're older and they may not have the same sort of online education."

NHH Panel Member



Educate businesses

- **NHH Members** highlight limited understanding of future energy changes amongst SMEs
- There is an opportunity to **educate SMEs on changes and the potential benefits** they bring, making it easier for businesses to prepare

"Guidance and advice on making that transition because it's a new product, it's a new way of working effectively."

NHH Panel Member

The ideal Green Academy: What to avoid

Due to the current economic context, Members emphasise the need to avoid wasting resources, which can be achieved by:

Use existing infrastructure

- Making use of **existing resources** at NGN, and through **partnerships** with education institutions to ensure cost efficiency
- **Check viability before committing** e.g. use pop-ups and events to assess interest. This is especially the case if there is a focus on deprived areas, where Members are concerned about lack of uptake

Focus on transferable skills

- With the current uncertainty, Members are concerned about the programme being too niche, and resources being wasted if there is a policy shift
- Having a **flexible programme, with a diverse range of modules**, is key to future-proofing the workforce

"You'll get more of an engagement, [if] you say by the end of it, you will get a Green Academy certification which you can use in so-and-so, so-and-so, so-and-so."

Workshop Panel Member

Generate real jobs

- Members want to avoid a situation where their bills are used to fund an ineffective programme
- They are **happy to contribute**, but only **if the programme helps people into work**

"If you train them to do X, Y, and Z and then decided, oh, we're not going to do that anymore, what's the point doing it?"

Workshop Panel Member

Recommendations for NGN's approach to skills development and education outreach

Members want NGN to deliver a programme which futureproofs the workforce and creates tangible opportunities for wider communities, whilst avoiding the risks of the 'green' focus

Rebrand away from 'green' towards skills and technologies

The 'green' focus is not seen as helpful, especially during a period of policy uncertainty. Members favour focusing on engineering skills, methods and new technologies instead to minimise risk and avoid wasted resources.

Focus on transferable, future-proof skills

Design training that equips people for an evolving energy system without committing to one path. Emphasise practical engineering skills, with additional, flexible green modules that can be adapted as change occurs.

Ensure tangible outcomes through qualifications and career pathways

Ensure programmes have clear progression routes into work, and enable beneficiaries to gain accredited qualifications that improves their employability across the sector if specific job opportunities are not available.

Continue outreach with disadvantaged communities

Conduct targeted outreach with disadvantaged young people, enhancing this approach to ensure this appeals to, and reaches, the target audience. Link education outreach to the skills programme if possible.

Embed training programme in education institutions

Partner with colleges and higher education institutions to create an engineering training programme which results in qualifications. Course design should be led by institutions with NGN experts consulted to ensure effectiveness.

05

Intergenerational fairness

Navigator



Context

This session aimed to gain insight into Members' perceptions of intergenerational fairness and potential methods of paying for investment

Workshop and inclusive panel Members discussed:

What intergenerational fairness **means to them**

Which method of paying for investment feels **fairest**

Which method of paying for investment feels the fairest considering **potential future challenges**

Key information presented to the panel to inform meaningful discussion



A fair approach

Intergenerational fairness = How costs, risks, and benefits are shared between today's customers and future customers

Three ways to pay for investment

What feels fair between today and the future?

1	2	3
Keep today's bills down	Spread the impact	Pay back more sooner
Lower now • Higher later	Balanced now • Balanced later	Higher now • Lower later
- Lower bills today - More costs passed to future customers - Greater reliance on spreading costs over time	- Moderate bills today - Moderate costs passed forward - Costs shared across generations	- Higher bills today - Less cost left for future customers - More paid closer to when investment happens

What could happen in the future

Why fairness is difficult: we don't know what lies ahead

Challenge 1	Challenge 2	Challenge 3
Recover costs faster – accelerated depreciation	Investment needs change – end of Repex	Fewer customers remain – declining customer base
<i>"Pay more now to reduce future risk"</i> - Costs recovered more quickly - Higher bills today, less left to pay - Protects against uncertainty Fairness tension: Should today's customers pay more to avoid future risk?	<i>"Future costs may be less"</i> - Less need for large infrastructure replacement - More stable or lower future costs Fairness tension: What if today's customers pay more than turns out to be needed?	<i>"Fewer people share the cost"</i> - Fixed costs spread across fewer households - Remaining customers may face higher bills Fairness tension: Is it fair if some customers are left paying more than others?

What does intergenerational fairness mean?

Varied definitions of intergenerational fairness are often underpinned by similar values



Looking beyond your own cohort

Many feel past generations did not consider the impact of their decisions on the future. They therefore struggle with the notion of thinking more about the next generation and potentially making sacrifices that they will not see the benefits of.



Views reflect today's reality

Financially insecure Members are exhausted by the demands of daily life and the state of the economy. A key tenet of fairness is recognising the pressure people are under right now – not solely focusing on the future.



Fairness without addressing existing imbalances

Members do not want younger generations to 'miss out' or be disadvantaged. However, many felt past imbalances should not be 'paid back' – instead, they want a fair approach for all moving forward.

Financial insecurity hinders the ability to help

There is a strong desire to help others and future generations, and to build a better society for all. However, many don't have the financial security to comfortably make further sacrifices to their living standards.



Key takeaway

Fairness is about recognising the challenges faced at different life stages and ensuring no generation carries an unfair burden. Underpinning this is a broadly shared values set - of kindness, respect, equal opportunities and accessibility – even when views differ on how intergenerational fairness can be achieved.

Where is there generational division?

Discussions highlighted tensions between generations but also shared values



Different perceptions of 'hardship'

Older participants often feel younger people have had it easier than they realise. Many are tired of being told they had it easy, and some felt younger generations expect too much and are unwilling to 'graft' in the same way they did.



Younger generations face a different reality

While not everyone can fully recognise the challenges facing young people, many feel that housing costs, university tuition fees, technology and a changing job market are creating a very different set of challenges for young people.



Views evolved through deliberation

As discussions progressed, many acknowledged each generation faces its own advantages and disadvantages. The intergenerational impact of the cost of living on housing, pensions and the jobs market built a sense of shared values and challenges across generations.



Generational division is amplified externally

Many see the media and social media as exaggerating generational conflict and fuelling the defensiveness around this topic.



Inclusive panel difference

More empathetic and concerned towards young people's futures than the workshop panel.

Instinctive preferences for the 'fairest' option

In general, customers are initially drawn towards the middle option 2 – to spread the cost

Option 1

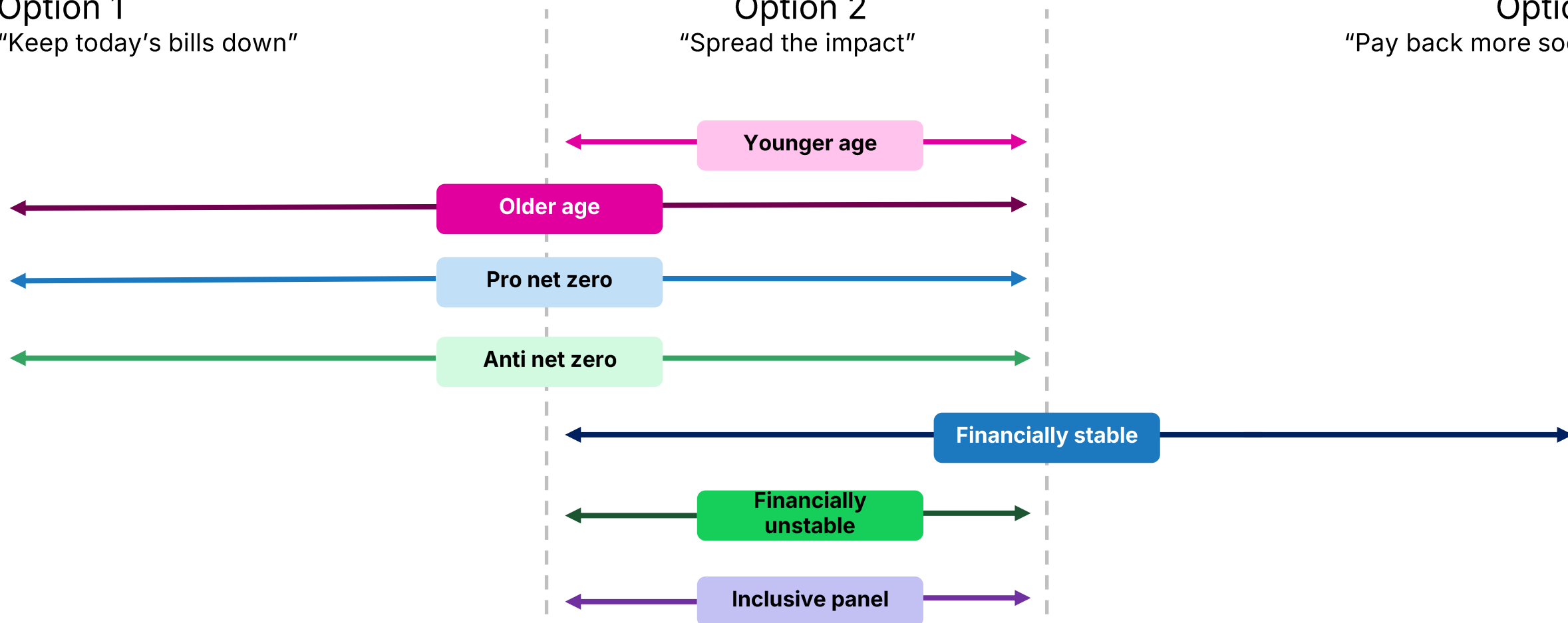
"Keep today's bills down"

Option 2

"Spread the impact"

Option 3

"Pay back more sooner"



Sub-group differences emerged during initial discussions

Age and financial security were key drivers of Members' instinctive preferences, while net-zero attitudes didn't strongly affect views at this stage



Age

- Age plays a **key factor** when exploring fairer ways to pay for investment. While **older generations** were initially **split** between options 1 and 2, **younger generations** were more **confident** in their preference for option 2. Younger Members feel they would **benefit** from investment while **avoiding** increased costs later down the line

"Why should [younger generations] be the ones who have to foot the bill for this one?"

Workshop Panel Member (YIC)



Financial security

- Financial security is another key factor when considering fairer ways to pay
- Those who feel **financially insecure** are more likely to gravitate to **option 2** as they favour stability, reducing the risk of large increases in the future
- Those who feel **financially secure** are more likely to consider **option 2 and 3**, feeling that if they can pay more now then they should



Net-zero attitudes

- Net-zero attitudes **did not** impact initial views when exploring fairer ways to pay
- Most Members are initially split between option 1 and 2 and did not immediately link the impact that **decarbonisation** may have on **customers in future** and fairer ways of paying
- Despite this, net-zero attitudes played a larger role as discussions progress

Psychological theories can help identify further motivations behind initial preferences

Members subconsciously turn to mental short cuts to aid their decision-making process



Behavioural economics

- **Psychological evidence** shows that when individuals are given three choices, they are **more likely** to chose the **second option**
- **Loss aversion** also plays a role here, with individuals often choosing the **least 'risky'** option where the fewest people lose out

"I guess it balances the responsibility between everyone."

Workshop Panel Member



Personal bias

- Many Members hold **negative opinions** toward the **younger generation's** work ethic
- There is a perception that options 2 and 3 will 'mollycoddle' future generations i.e. if older generations could get by without protection, younger generations can too
- These biases lead them to believe younger generations are **less 'deserving' of support**, making them more likely to consider **option 1**



Life experiences

- Life experiences impact perceptions of options, for example, Members with children are more likely to feel that it's fair to **protect future customers**
- Similarly, those who are more **financially stable** are more likely to consider **option 3**, feeling they can afford this. Those who are **struggling financially** right now are more likely to consider **option 1**

Tension develops as Members grapple with uncertainty

They struggle to follow their own personal values when faced with an uncertain future



Personal values

- Members' personal values influence their initial preferences
- Members who value **self-sufficiency** and have **low trust in institutions** gravitate towards **option 1**
- Those who are **risk-adverse, balanced** and **fear uncertainty** are more likely to consider **option 2**
- Finally, **future-minded collectivists** find their preference in **option 3**

"I'm thinking at my age, if somebody said you need to pay an extra £5 a month until you die to keep costs lower for generations coming up, I would be happy to do that."

Inclusive Panel Member



Uncertainty

- However, following these personal values is not always possible considering the **cost-of-living context** and **future uncertainty**, which can cause a 'back to the wall' mindset
- Discussions surrounding cost of living encouraged Members to **reconsider the status quo** and whether continuously pushing costs to future generations is truly working
- However, tensions arise here based on a perception of '**double paying**' for past and present generations and whether this feels **fair**

"I just think the world is so unstable at the moment ...no one knows what's going to happen 10 years down the line."

Workshop Panel Member

Issues with discussing options in principle

Contentious issues such as cost of living, uncertainty and trust can lead to barriers to reaching a consensus



Cost of living context

- Many Members **cannot afford to pay more now**, even if they want to protect future generations in principle
- A minority of Members want a **new option** where wealthier customers and high use non-household customers pay back more. This reflects policy considerations seen in [Ofgem's Energy system cost allocation and recovery review](#)

"People are in such a precarious position now financially, I think it's really difficult to put too much more on households now."

Workshop Panel Member



Uncertainty

- The uncertainty of the future influences Members to want to help individuals who are **struggling in the present** rather than an **unknown collective** of future individuals in hardship
- Inversely, especially as the future of the gas network is so uncertain, other Members believe the fairest thing to do is to **spread the costs** so there is some protection for all

"We don't know what our bills are going to look like in the future...they involve a lot of external factors that are sometimes out of our control."

Inclusive Panel Member



Lack of trust

- **Trust in institutions is low**, with many Members not trusting that this decision will make a difference in future
- Members feel that the **benefit will get lost** in intervening years and **do not trust** that bills will ever truly come down
- A minority believe this deliberation to be **unimpactful** as they feel that customers outside of the panel do not know enough about their bills to **challenge** paying for previous investments

Challenges highlight an uncertain future for the gas network

This can exacerbate scepticism and leaves some Members feeling confused

Challenge 1

Recover costs faster – accelerated depreciation

- This challenge **does not** make “paying more back sooner” more appealing
- A majority of Members could understand why NGN might have to be **flexible** in this scenario but feel that they either **cannot pay** anything more due to cost of living or feel that **option 2** is a better **compromise** for offering more stability

“I think the middle path is the way to go where nobody's hurting and we're all paying some towards past and future.”

Workshop Panel Member

Challenge 2

Investment needs change – end of Repex

- This challenge causes confusion for many Members and **does not** make “paying more back sooner” more appealing
- Most **do not understand** what the ‘benefit’ would feel like from having newly replaced pipes
- Furthermore, the view that most customers do not understand their bills makes this challenge **redundant** to some, as customers wouldn't know enough to dispute their bills

Challenge 3

Fewer customers remain – declining customer base

- This challenge **does not** make “paying more back sooner” more appealing
- A majority of customers are **sceptical** of this challenge and **do not believe** the customer base will fall if net-zero policies continue to change

“Who can predict that they will not scrap the gas idea?”

Workshop Panel Member

Further reflection encourages view evolution

Space for further contemplation on choices and challenges elicited stronger views from Members



Pessimism

- Many Members feel **pessimistic** about the future. As discussions surrounding fairness and challenges unfolded, this pessimism **grew** for some
- Those feeling higher levels of **pessimism** and **financial instability** experienced an evolution in their views and became **more comfortable** with **option 1** due to a feeling that current customers need **to look out for themselves**

"Why would you pay more now just on the off chance that it could happen?"

Workshop Panel Member

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Collective resolve

- However, this pessimism had the opposite effect for Members who formed a **collective resolve**. These Members believed that change is **necessary** given how negative the current situation is
- These Members were therefore more likely to prefer **option 3** as discussions progress, feeling that they have the opportunity to **change the 'system'** and that this would **mitigate any challenges**

"If we can do something now, let's try and ebb that flow a little bit for the ones later down the river."

Inclusive Panel Member



Net-zero

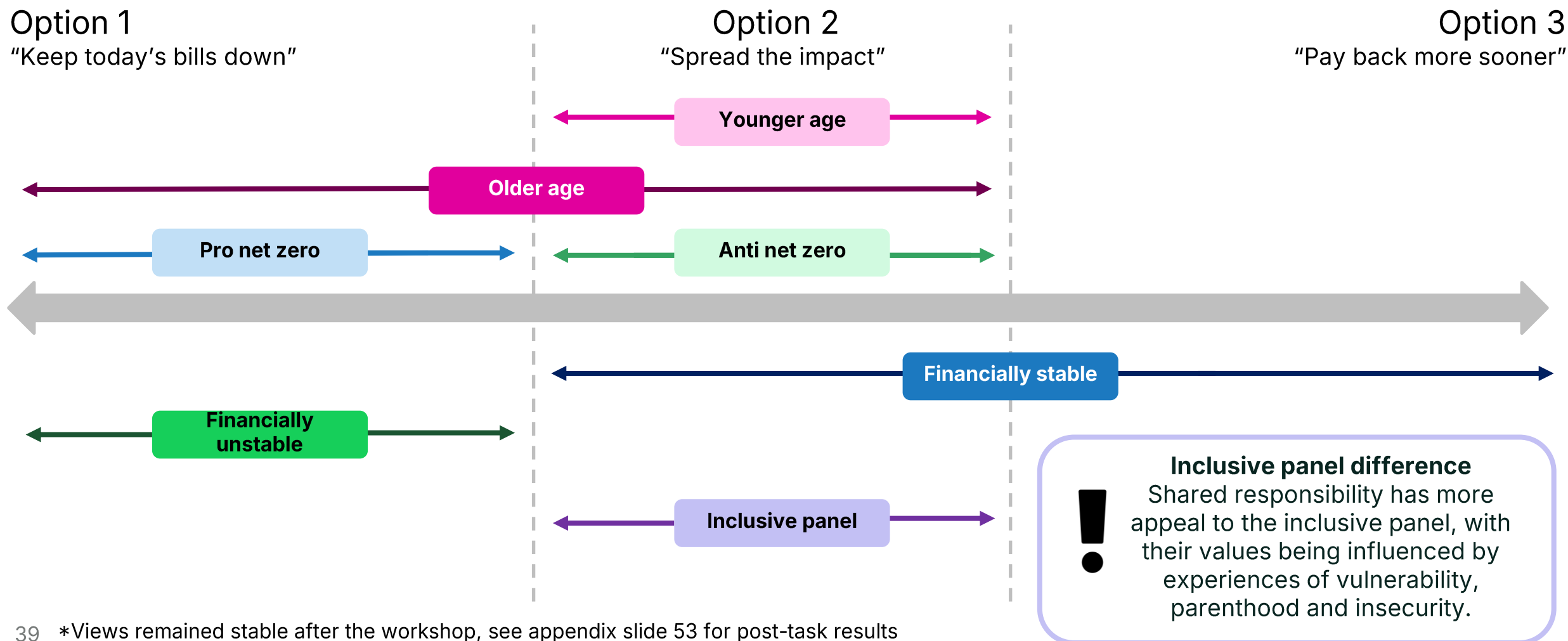
- Members who feel **hopeful** regarding **net-zero** progression are more likely to prefer **option 1** as discussions progress
- Reflecting on the challenges, some Members hoped the future would be decarbonised and gas network decommissioned. Interestingly, this led to choosing **option 1**, as they'd rather pay less now since it **wouldn't be their problem in the future**

"The future generation don't need to pay the bill because they can have a solar, they can use the green energy."

Workshop Panel Member

Following deliberation, option 2 is the preferred choice

However, as a result of view evolution some subgroups became more attracted to option 1



Underlying principles for intergeneration fairness

Members created the following principles for NGN to ensure intergenerational fairness:



Transparency

Members want NGN to keep customers informed about any new decisions, with clear explanations as to why and how these have been made.



Togetherness

Members want to feel that there is a partnership between customers and the business, especially during decision making.



Safeguarding

Members feel anxious about the future, where NGN can they should safeguard present and future customers as much as possible.



Empathy

NGN should continue to communicate with customers in an empathetic way, acknowledging the hardships that they might be facing.

06

Appendix

Navigator



Workshop sample demographics

July 2026



18-29: 13%
30-44: 23%
45-59: 37%
60+: 27%



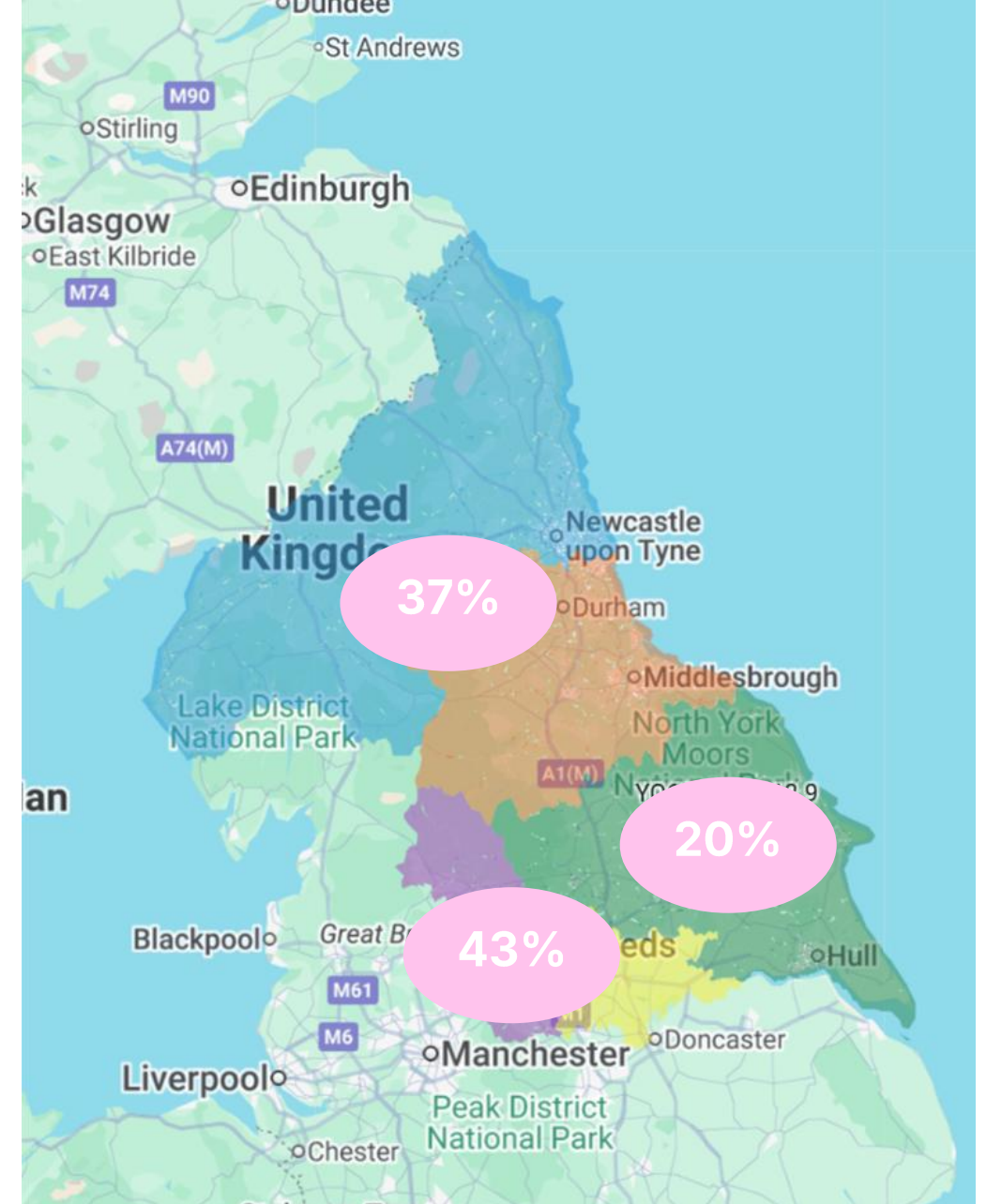
Female: 57%
Male: 40%
Non-binary: 3%



White British: 63%
Asian/Asian British: 20%
African: 3%
Mixed/multiple ethnic groups: 3%
Other ethnic group: 3%
Prefer not to say / self describe: 6%

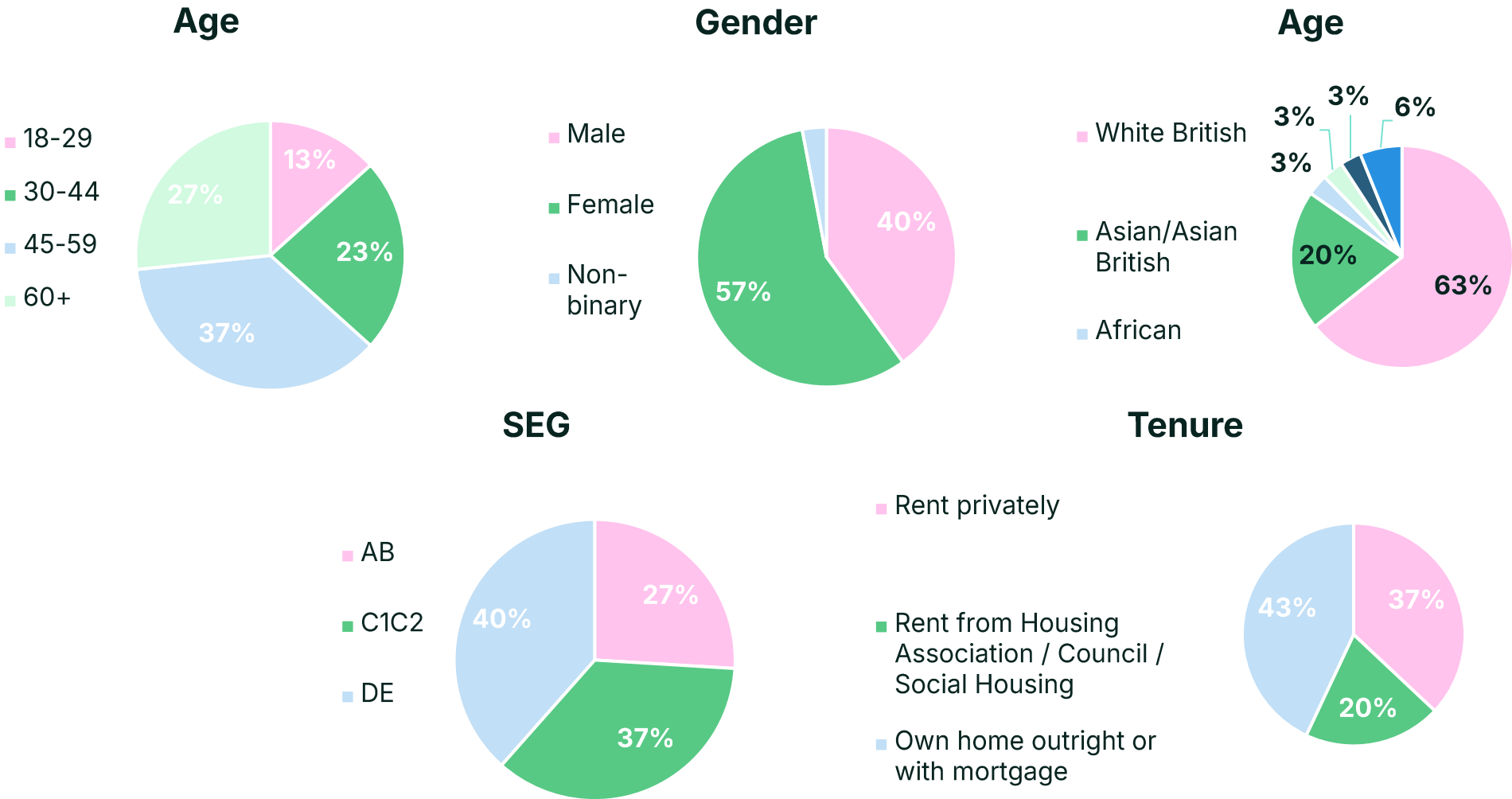


Micro/Small business owners
(NHHs): 3



Workshop Panel sample demographics

July 2026



Inclusive Panel demographics

Gender	Male	3
	Female	7
Age	18-29	2
	30-44	4
	45-59	2
	60+	2
Ethnicity	White British	8
	Asian / British Asian	2
PSR status	Registered on PSR	6
	Not registered on PSR	4
SEG	ABC1	8
	C2DE	2

Participant no.	Mental health disability	Physical disability	Cognitive disability	Sensory disability	Long-term health condition
1					X
2	X				
3		X			X
4		X	X	X	X
5		X			
6	X				X
7		X		X	X
8		X			
9		X			X
10		X			

Non-household Panel demographics

Business size	Micro (1-9 employees) / small (10-49 employees)	5
	Medium business (50-249 employees)	3
Location	Central (West Yorkshire e.g Bradford, Leeds, Halifax, Huddersfield, Wakefield)	4
	North (e.g Newcastle, Sunderland, Carlisle, Darlington, Durham, Northumberland)	2
	East and North Yorkshire (e.g. Harrogate, Skipton, Northallerton, Hull, York, Scarborough)	2
Geography	Coastal	1
	Inland	7
	Rural	3
	Urban	5
PSR status	Registered on PSR	6
	Not registered on PSR	4
Sector	Hospitality and food service	1
	Manufacturing, light industry, and agriculture / farming	3
	Retail and high street businesses	2
	Public and community services	2

Workshop feedback

1 in 4 (7/28) had no suggestions for improvements, with an overall positive experience on the day.



Afternoon fatigue

- Several felt that the energy levels dipped in the afternoon, with the agenda stretched beyond the amount of deliberation required.
- Participants with this view suggested shortening the afternoon session, reducing the number of breaks or frontloading more activities in the morning.



Audio and room set up

- Feedback highlighted the microphone and speaker system as a recurring frustration, with some commenting that it disrupted the flow of discussions.
- Difficulties hearing other tables, combined with unreliable audio equipment detracted from the plenary activities.



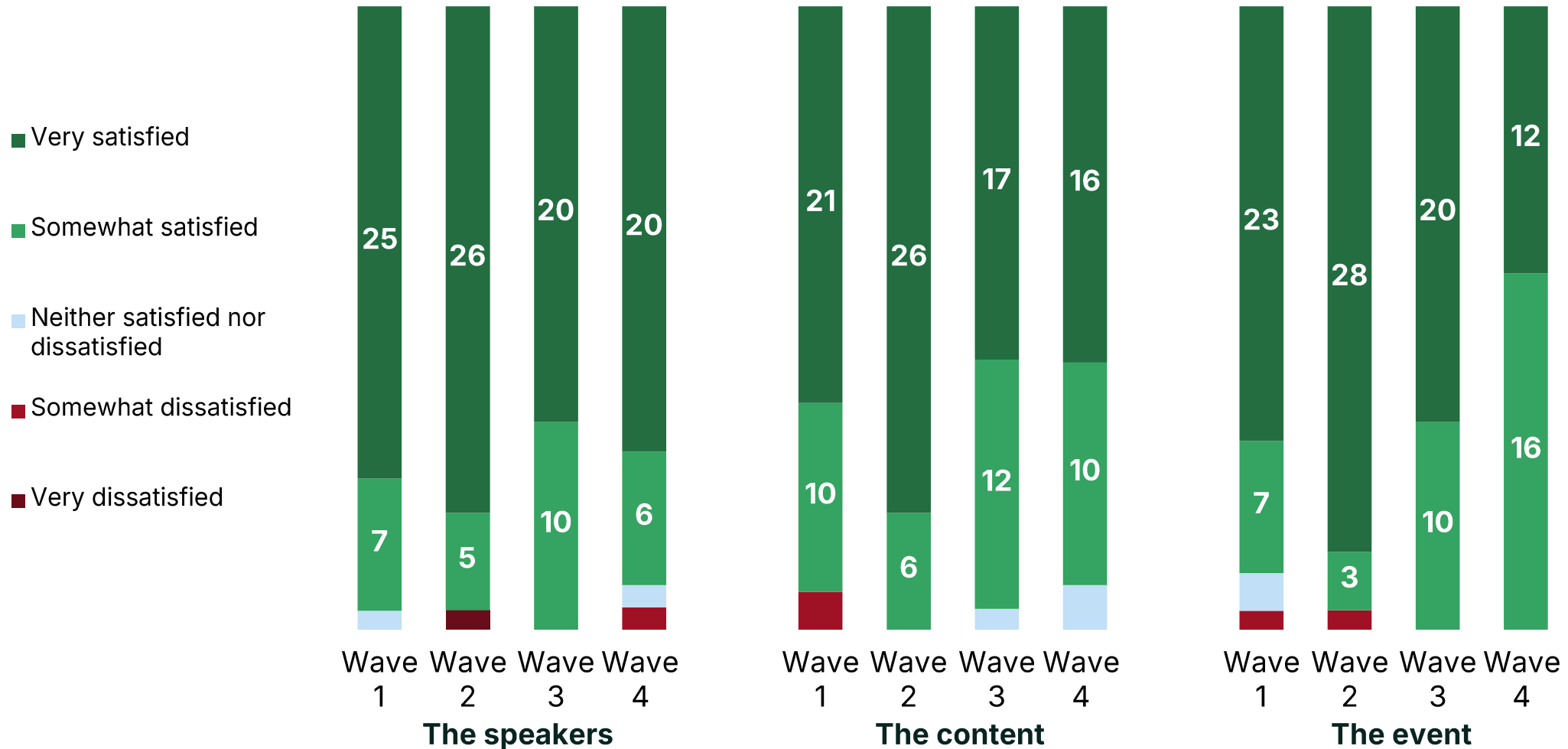
More time for table discussions

- A small number felt that there was not enough time in the group discussions to allow them to put their views across.
- These Members want to have longer group discussions, to explore topics in greater depth and ensure more Members can contribute.

Overall satisfaction remains high, though the number 'very satisfied' with the event has dipped.

How satisfied were you with...?

Base: All Wave 1 workshop attendees (33); All Wave 2 workshop attendees (32); All Wave 3 workshop attendees (30); All Wave 4 workshop attendees (28)

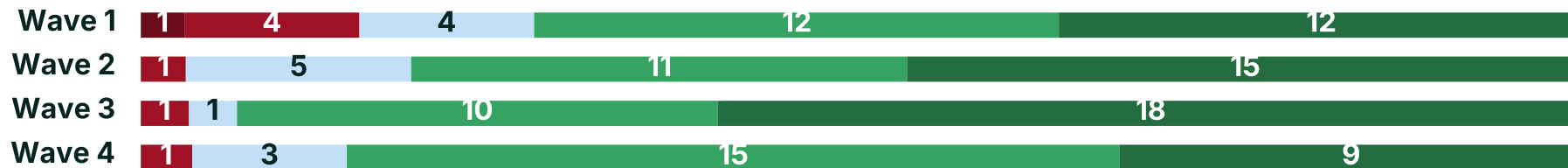


This wave a small number felt they were not provided with enough information

To what extent do you agree / disagree with the following...
Base: All Wave 1 workshop attendees (33); All Wave 2 workshop attendees (32); All Wave 3 workshop attendees (30)

Strongly disagree Disagree Neutral Agree Strongly agree

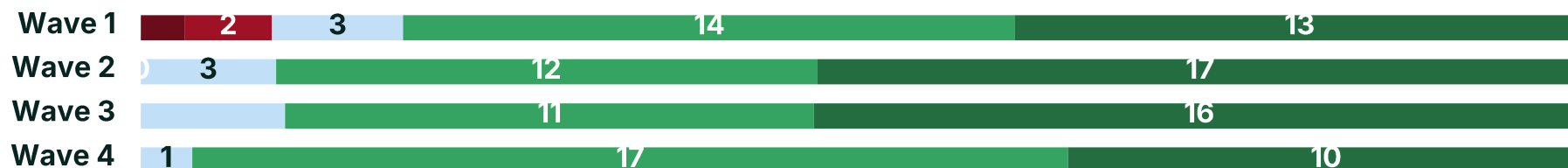
Sufficient time was allowed for discussions



I was provided with enough information



The information provided was easy to understand



The event was accessible



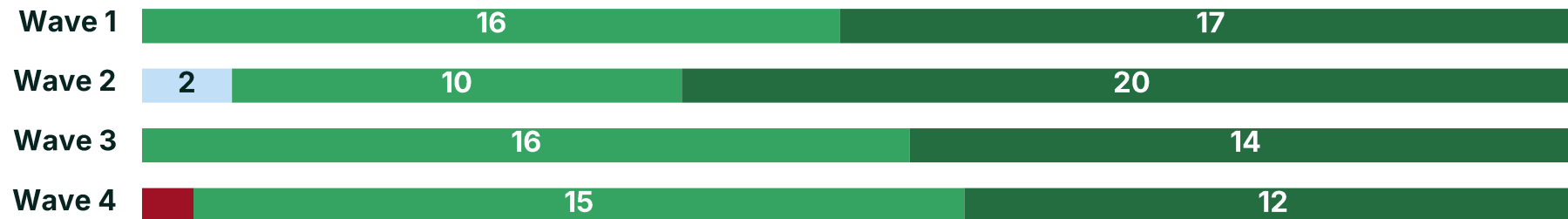
The number in agreeance with the engagement design remains consistent with previous waves.

To what extent do you agree / disagree with the following...

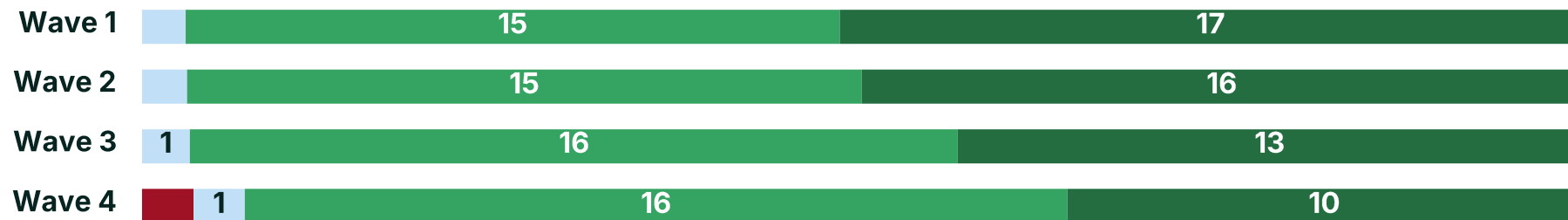
Base: All Wave 1 workshop attendees (33); All Wave 2 workshop attendees (32); All Wave 3 workshop attendees (30)

Strongly disagree Disagree Neutral Agree Strongly agree

NGN designs engagements in a way that makes me feel involved and heard



NGN is honest about its future choices and what my engagement will influence



NGN engagement is a good use of time and money



The number in agreeance with the engagement design remains consistent with previous waves.

To what extent do you agree / disagree with the following...

Base: All Wave 1 workshop attendees (33); All Wave 2 workshop attendees (32); All Wave 3 workshop attendees (30)

Strongly disagree Disagree Neutral Agree Strongly agree

NGN makes it clear how it has used its feedback to change its business plans



NGN provides me with clear information



NGN enables me to give feedback on the topics that interest me most

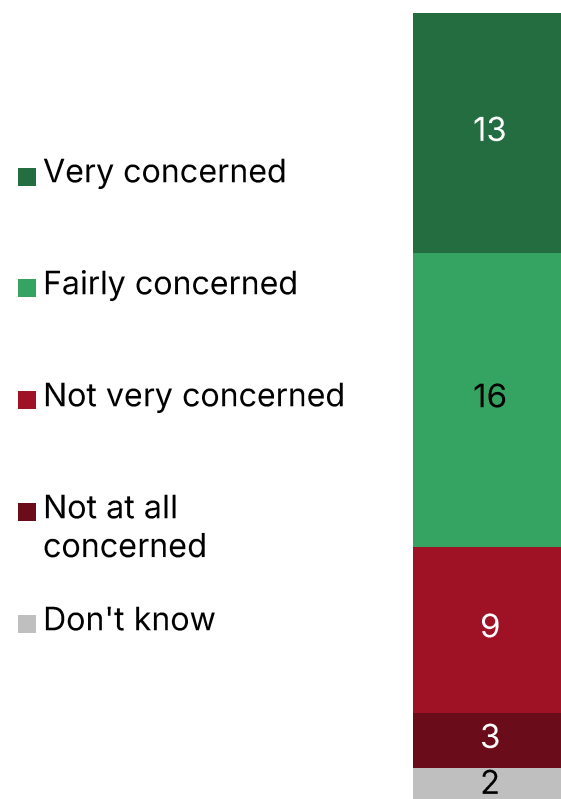


Most are concerned about climate change.

Business, industry and the government are the groups identified who should have the most responsibility for efforts.

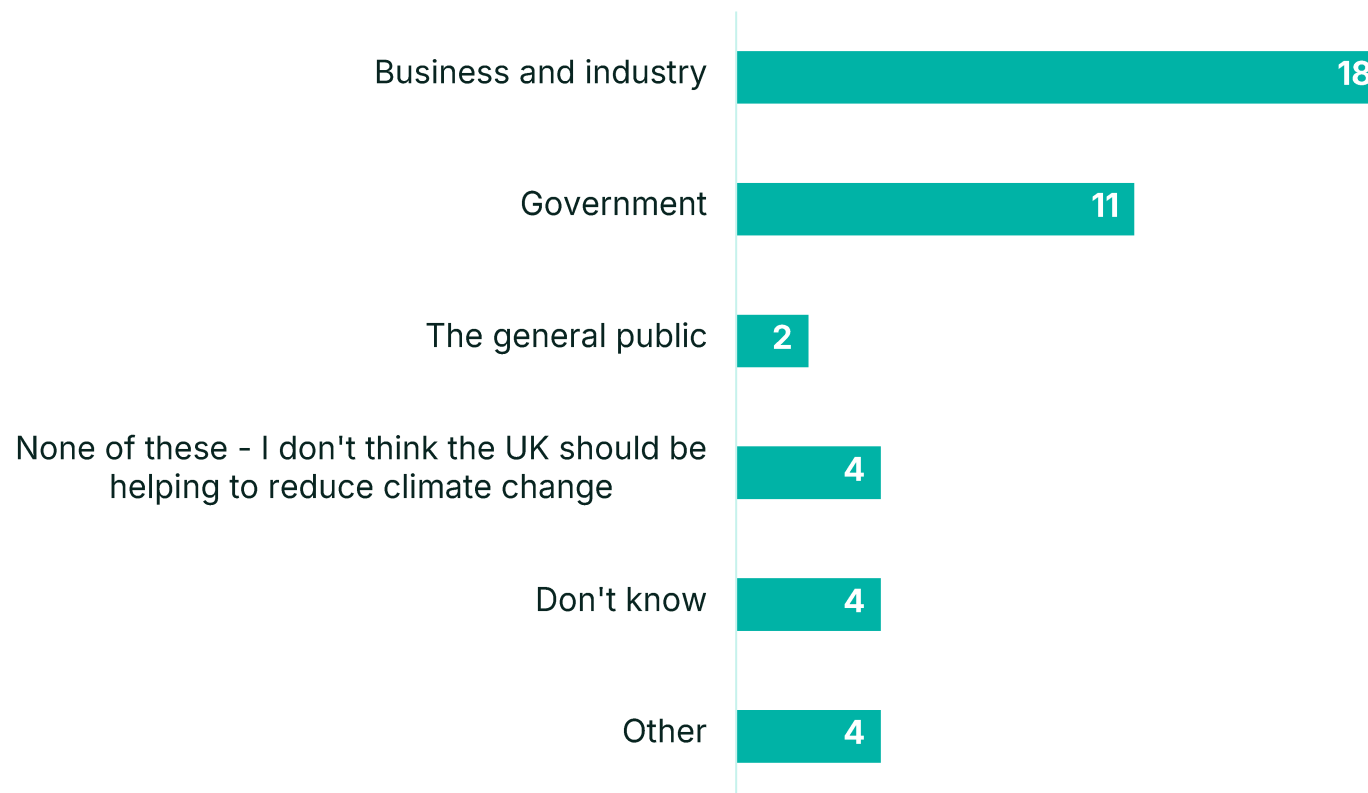
Concern about climate change

All respondents



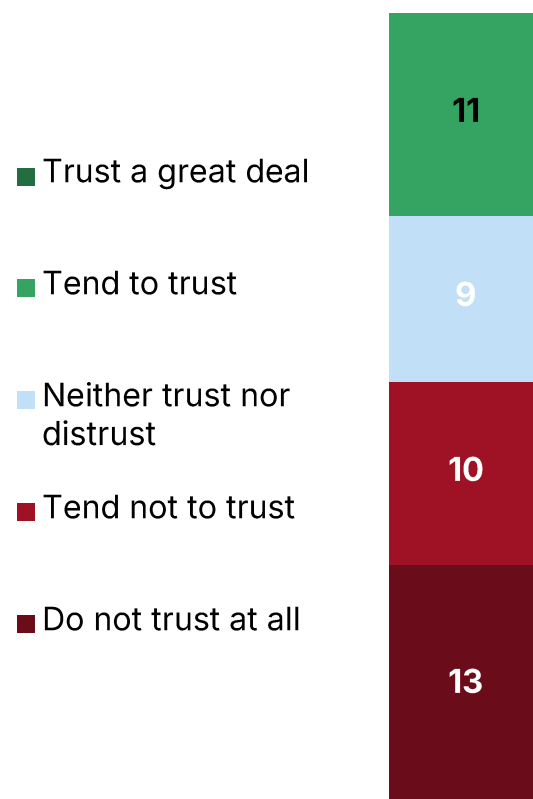
Group who should have the most responsibility for helping to reduce climate change in the UK

All respondents



Roughly 1 in 4 trust the government to make decisions in the best interests of the public

Trust in UK Government to make decisions in best interests of public
All respondents

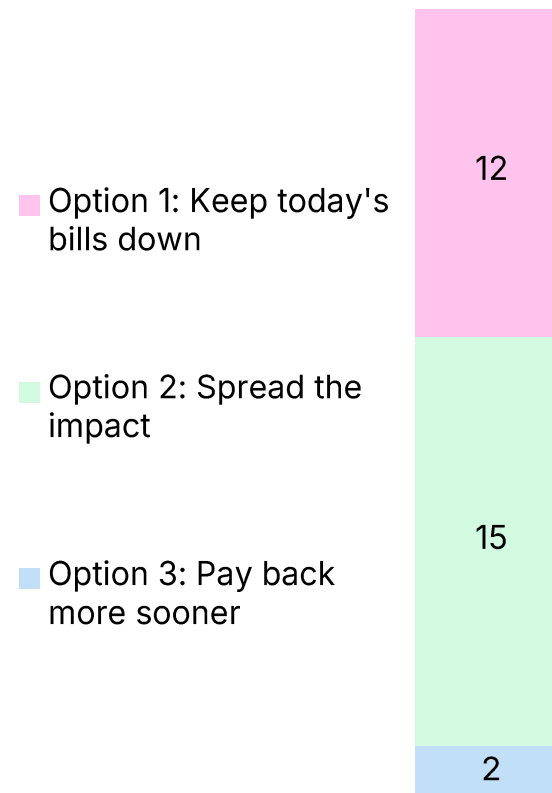


Following the workshop, just over half prefer to spread the impact

In line with their views on intergenerational fairness and the current economic climate, only two prefer to pay back more sooner.

Of the three ways to pay for investments, which is your preferred option?

Base: All Wave 4 workshop attendees (28)



Thank you