

ISG Meeting – NGED-ISG05
Meeting Date: 23 March 2026
Location: NG Office, London
Meeting Time: 09:30 – 16:00



Attendees:

Chair: Trisha McAuley
Vice Chair: Una Brosnan

ISG Members:

- Barbara Anderson (online)
- Cheryl Hiles
- Rahoul Bhansali
- Regina Finn (online)
- Rob Gross (online)
- Russell Greenslade (online)

National Grid Representatives:

- Cordi O'Hara, ED President
- Paul Branston, ED Director of Regulation
- Chris Hayton, ED Director of Corporate Affairs
- Julie Taylor, ED Director of ED3
- Tim Polack, ED Director of Strategy & Transformation
- Emma Pamplin, ED Director of Customer Excellence
- Sarah Jeffery, ED Head of Engagement & Insights
- Marena Lesskiu, ED Stakeholder Engagement Officer

For Agenda Item:

Customer Strategy and Vulnerability Strategy

- Cuan Rowlands, ED Connections Strategy/Policy Manager
- Fiona Nicholls, ED Head of Vulnerability

Apologies for Absence:

ISG Members

- Duncan McCombie

Declarations of Interest:

Duncan McCombie, Vice Chair of EnergyCloud England.

Minutes:

Ahead of each of the themed discussions and at the end of the day, the ISG met in closed session, without NGED representatives.

Item One: ED3 Contextual Update

NGED provided an update on:

- RIIO-T3 Final Determinations for electricity and gas transmission, and GD3 gas DNOs Final Determinations and subsequent CMA appeals.
- Recent senior discussions with Ofgem regarding the holistic transition scenario, increased focus on affordability, the use of flexibility as a strategic asset, and consumer value in ED3. Further guidance expected in SSMD, expected in May 2026.
- The potential to expand DNOs business model with the Government warm homes plan and ongoing work to prepare National Grid's view on the topic.
- 21 Early Proposals were selected by Ofgem to progress to the next stage, of those 7 were NGED's.
- Ofgem's Warm Homes Consultation and the potential expansion of DNOs' roles in supporting the rollout of LCTs and energy efficiency. No decisions have been made yet and NGED is developing its response to the consultation, which will be shared with the ISG once completed.

Item Two: ED3 Strategy

NGED presented the ten-year Business Unit Strategy (2025–2035), centred around affordability and customers, to respond to accelerating change in the energy system and to set clear direction for ED3, highlighting:

- The ambition to be the leading DNO and DSO, enabling a secure, affordable and clean energy future and seizing the growth opportunity from decarbonisation.
- The route to the ambition is being number one for customers to enable regulatory performance, future flexibility, and sustainable returns.
- The strategy will be underpinned by three pillars:
 - Segment-driven customer value propositions
 - Growth, enabled by the DSO
 - Innovation and digital as a strategic enabler
- A strong foundation on National Grid Group capabilities and a focus on safety, productivity, and leadership.
- The ED3 Strategy is built on the ED2 Transformation Plan, which prioritises customer experience, efficient operations, and people.
- The early thinking on the Business Plan Commitments, which will focus on delivering value for customers, being acceptable to Ofgem, and stretching as a business.

The ISG requested:

- Visibility of IT & Digital Strategy and its benefit for customers, how it is embedded across the business and wider ED3 strategies, and how NGED's culture will enable the required technological changes.
- Clarity on how customer success is measured, going beyond regulatory outcomes and assessing customer needs and outcomes.

- Visibility of the cultural transformation and deliverability plans, including workforce and supply chain considerations.
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Item Three: Customer Strategy

NGED presented its emerging Customer Strategy, which will underpin the ED3 Business Plan and ensure that customer needs and expectations drive outcomes as customers progress through the energy transition. The strategy is grounded in extensive customer and stakeholder engagement over the past 18 months and represents a shift from a uniform service model to a segmented, outcome focused approach. Key points highlighted included:

- The ambition to be the leading DNO and DSO by being number one for customers, with customer needs forming the foundation of the ED3 Business Plan.
- A clear move away from treating all customers the same, towards segmentation-led propositions that recognise the diversity of NGED's customer base, from households and SMEs to large generators and capacity critical customers.
- Identification of six core customer need states (Reliability, Reassurance, Value for Money, Readiness, Cost Control and Monetisation), with the first three applying to all customers and the latter three to those transitioning to low carbon technologies.
- An updated and more granular six-segment customer model, informed by targeted engagement across residential, vulnerable and B2B customers, to better reflect differing needs, expectations and service requirements.
- A focus for ED3 on delivering:
 - Digital first and multichannel customer journeys
 - Proactive communications, particularly during outages
 - Simpler, segment specific connections journeys
 - More sophisticated, engineering led engagement with medium and large B2B customers
 - A refreshed approach to supporting vulnerable customers
- The principle that treating customers fairly means treating them differently, with fairness achieved through meeting distinct segment needs rather than providing a uniform, averaged service.

The ISG requested:

- Greater clarity on how customer outcomes will be defined and measured, including how NGED will assess success beyond existing regulatory metrics.
- Further explanation of how segmentation will translate into decisions and trade-offs in ED3, particularly where customer needs may conflict.
- Clearer articulation of how the Customer Strategy integrates with other ED3 strategies, including Vulnerability, Connections, DSO and Interruptions strategies.
- Continued visibility of how ambition in customer outcomes will be balanced with affordability and deliverability in ED3.

Item Four: Vulnerability Strategy

NGED presented its emerging Vulnerability Strategy, setting out how it intends to identify, support and protect vulnerable customers through ED3, building on ED2 foundations and aligning closely with the Customer Strategy. The presentation emphasised that vulnerability is a core consideration as reliance on electricity increases and customer circumstances become more complex. Key points highlighted included:

- The recognition that vulnerability is multi-dimensional, extending beyond financial hardship to include health, disability, mental health, language barriers, trust, and situational factors.
- The continued importance of the Priority Services Register (PSR) as a key mechanism for identifying and supporting customers who may need additional help, alongside wider partnerships and referral routes.
- The intention to move from a predominantly reactive model to a more proactive approach, including earlier identification of vulnerability and better preparation and support for customers.
- The role of partnerships with charities, community groups and local organisations to reach customers who may not engage directly with NGED.
- Early thinking on ED3 commitments, including digital inclusion, improved information and control for customers over their data, and stronger community-based resilience.
- The ambition to embed vulnerability considerations across customer journeys and business activities, rather than treating vulnerability as a standalone issue.

The ISG requested:

- Clearer articulation of how NGED defines vulnerability within the strategy, ensuring this reflects the full range of vulnerability types and is clearly communicated.
- Greater clarity on how vulnerability is considered beyond power cut scenarios, including day-to-day interactions, connections and wider customer journeys.
- A stronger narrative on customer outcomes and ambition, moving beyond benchmarking against peers and regulated minimums.
- Visibility of how vulnerability is embedded across ED3 strategies, including Customer, Connections, Interruptions and Digital strategies.
- Further detail on how NGED will identify and support hard-to-reach customers, including those who may not engage digitally or proactively seek help.