



Annual Stakeholder Report

2025



We are Wales & West Utilities

At Wales & West Utilities, we're passionate about ensuring that we provide our customers with a safe and reliable supply of gas whenever they need it. Our dedicated teams work around the clock to transport gas to the homes and businesses we serve while also preparing our network to carry the green gases of the future, such as biomethane and hydrogen.

Responding to gas emergencies, connecting new homes and businesses to our network and upgrading old metal gas pipes to new more durable pipes are also part of our core business. We are dedicated to making sure the communities we serve receive a safe and reliable gas supply for generations to come.

As a Gas Distribution Network, we are regulated by Ofgem. Our [current Business Plan](#) for the period 2021 to 2026 (known in the industry as GD2) provides more detail of the commitments we made to keep customers safe and warm every day. Our new [GD3 Business Plan](#) sets out our aims and objectives for the next price control, which will run from April 2026 – March 2031.

35,000+

kilometres
of gas pipes
maintained

2.5m

households
and businesses
supplied
with gas

7.5m

people
served

2,000

skilled
colleagues



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Welcome and Introduction

Celebrating 20 years of keeping communities connected

This year marks a major milestone for us – for 20 years we have safely and reliably kept the gas flowing across Wales and the south-west of England. While much of our network is out of sight, the benefits of our services are felt every day. To keep family dinners cooking, cups of tea brewing, and industries moving. Our work has supported daily life for millions.

We're proud to be a business built around people, and our communities are the reason we do what we do. Many of our colleagues live in the communities we serve, and many families have worked here for decades. Our achievements are thanks to the dedication of our incredible colleagues, whose commitment continues to drive outstanding performance and innovation as we look to the future.

Here's to the next chapter – and thanks to you, our stakeholders, for being part of our journey.





Our purpose and approach

Purpose of the report

This report outlines how we've engaged with stakeholders over the past year, the outcomes of that engagement, and how the resulting insights have shaped our strategic direction as we prepare for GD3. It reflects our commitment to listening, learning, and acting on the perspectives of those who rely on, and contribute to, our network – from customers and community partners to industry experts and environmental advocates.

Also featured in this report are the priorities that mattered most to stakeholders and the tangible outcomes we've achieved together. Our measurable progress is documented in work areas including network resilience, community support, and accelerating environmental commitments.



Listening



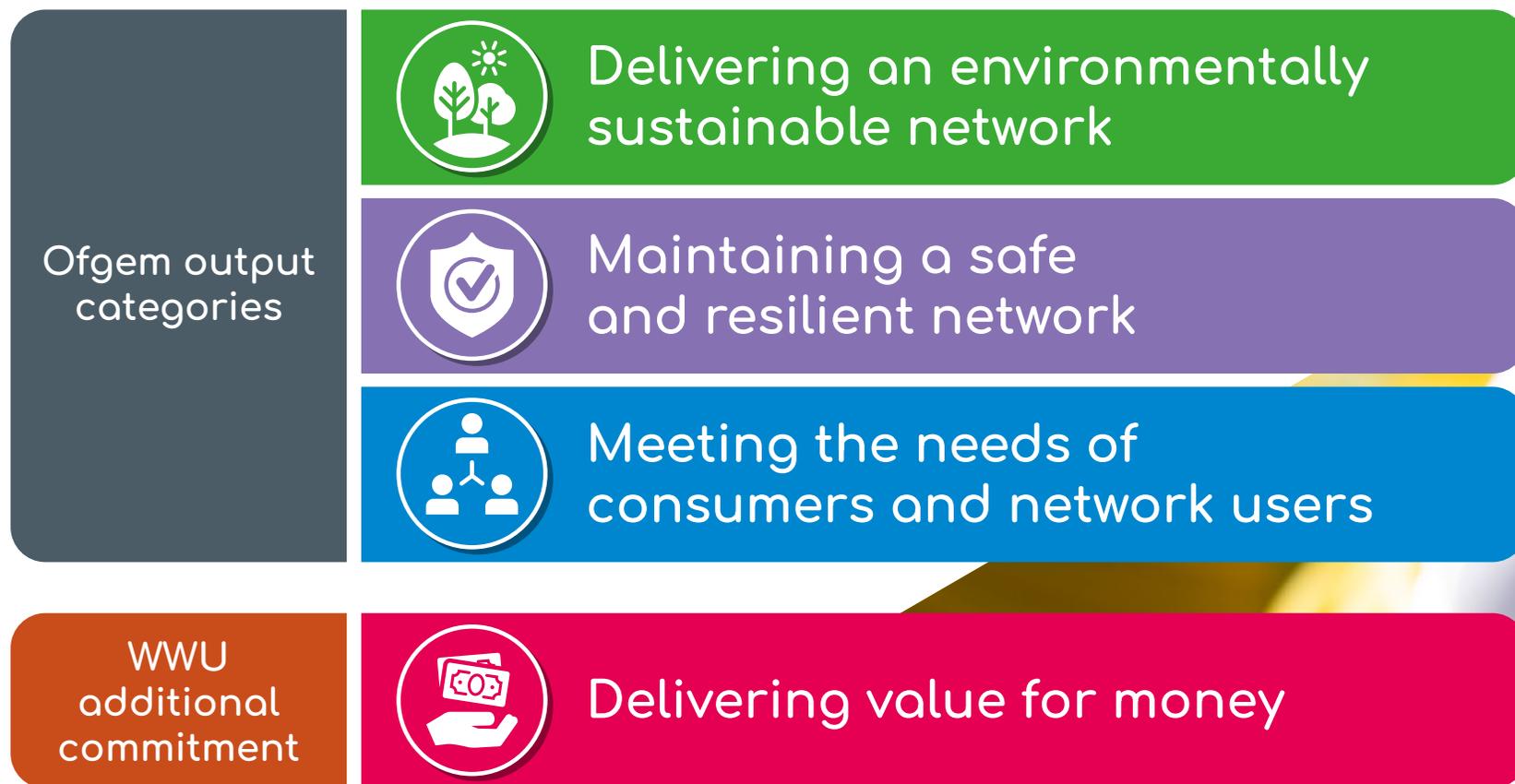
Learning



Delivering

Our commitments

The upcoming sections of our report reflect the three Ofgem output categories outlined in our GD2 Business Plan, to demonstrate how we are meeting regulatory obligations while showcasing our genuine value and impact. We have also added one additional commitment and section – “Delivering value for money”. This extra focus demonstrates our commitment to efficiency and achieving the best possible outcomes for stakeholders.



Our engagement priorities framework

The table below shows how our commitments align with the principles that guide how we listen, respond, and deliver value. These principles ensure our engagement is inclusive, impactful, responsive, and accountable – in support of our dedication to a safe, sustainable, and consumer-focused network.

| Commitment | Principle | Key focus |
|--|------------------------|---|
| 1.  Delivering an environmentally sustainable network | Materiality and impact | Focusing on issues that matter most to stakeholders and our long-term sustainability. |
| 2.  Maintaining a safe and resilient network | Governance and impact | Measuring and reporting on the outcomes of our decisions and their wider effects. |
| 3.  Meeting the needs of consumers and network users | Inclusivity | Involving a diverse range of voices, especially those most impacted by our services. |
| 4.  Delivering value for money | Responsiveness | Translating feedback into meaningful action and service improvements. |

Our stakeholder engagement approach

We continuously strive to be a sustainable business, putting people and communities at the heart of what we do. By **identifying** stakeholder needs and **tailoring** our engagement accordingly, we **analyse** the insights to **deliver** services that matter, while **evaluating** our impact to drive ongoing improvement.

Each case study in this report will follow a structure that echoes our approach:

Identify → Analyse → Deliver → Evaluate

The actions we outline link back to our strategy and are continuously informed by stakeholder feedback and impact assessment.



Key engagement overview

In 2025, we undertook a series of targeted engagement activities designed to align with our strategic priorities and deliver meaningful outcomes for stakeholders. The table below summarises a selection of these activities using our structured approach.

Our approach (Identify, Analyse, Deliver and Evaluate) ensures our engagement is purposeful, evidence-based, and ever-evolving in line with our strategy.

| Project | Identify  | Analyse  | Deliver  | Evaluate  |
|---|---|---|--|--|
| CARBON MONOXIDE EMERGENCY SERVICE ENGAGEMENT | <p>Needed to create a new customer leaflet and resources to provide during emergency call outs.</p> <p>Engaged 75 customers through focus groups and 1-2-1 interviews from a range of demographics.</p> | <ul style="list-style-type: none"> Insight gathered highlighted the need for clearer and more urgent communications. | <p>In response, we developed a cohesive suite of materials and resources that directly addressed stakeholder wants and needs, ensuring our messaging was both timely and impactful.</p> <p>Our new webpage and accompanying materials can be found here.</p> | <p>Before launch, materials were tested with engineers, internal colleagues, and Mindset – the original engagement consultancy – to ensure accuracy, clarity, and completeness.</p> |
| FUTURE GENERATIONS PANEL | <p>Engaged with a Future Generations Panel of 34 people aged 18–25 to understand their communication preferences.</p> | <ul style="list-style-type: none"> Young people prioritise mental health and financial security. Low awareness of Wales & West Utilities overall. Most interested in sustainability, emergency response, and support for vulnerable customers. Wanted relatable and varied video content. Low awareness of CO and PSR as current content feels irrelevant to them. | <p>Our sustainability team used these insights to launch the new “Did You Know” campaign, designed to make sustainability messaging more engaging and relevant for younger generations.</p> | <p>We will use the analytics of the campaign to test effectiveness for future campaigns.</p> |
| ANNUAL STAKEHOLDER WORKSHOP | <p>Engaged with 97 stakeholders to elicit feedback on our performance in GD2 and on our GD3 commitments and priorities.</p> | <ul style="list-style-type: none"> Stakeholders were supportive of our performance and plans but called for more collaboration. Call to focus on innovation, upskilling, community engagement. | <p>The insight from this report will be used to shape the delivery programme for GD3 and BAU.</p> | <p>We will build the report into our AI tool and review the findings against our delivery programme as we enter GD3. This will then be tested and refined with stakeholders through additional engagement.</p> |

Continued >

Key engagement overview | Continued...

| Project | Identify  | Analyse  | Deliver  | Evaluate  |
|---------------------------|--|---|--|--|
| LOW-CARBON TRACKER | Engaged 2,000 consumers from a broad range of demographics to understand attitudes towards low-carbon heating. | <ul style="list-style-type: none"> • There was a call for centralised, trusted information on net zero and low-carbon heating. • There was some willingness to invest in low-carbon heating, and some felt empowered to take action towards this. • However, there was concern around the need for greater transparency on the process. • For some consumers saving money was their highest priority. | The net zero team reviewed our “Future of energy” webpage to make it interactive, inclusive and informative. | The findings from this report were used to shape future communications and have been considered in our net zero delivery plan. |
| CYBER ENGAGEMENT | Needed to identify the strongest and weakest areas of our cyber resilience amongst colleagues – 32 colleagues interviewed. | <ul style="list-style-type: none"> • The friendly culture is a key benefit of working at Wales & West Utilities, and this provides an opportunity for communications on cyber security. • Awareness of the cyber team was low so profile raising was needed. • Tailored approach by workforce was encouraged. | Results were used to develop further quantitative research with colleagues through a quiz-based survey. | The combined findings and insight of both research reports will inform targeted training, improve policy communication, and strengthen their overall cyber resilience. |



Engagement in focus: AI-powered analysis

We have introduced an AI engagement analysis tool from Sirio Strategies to speed up and improve insight analysis. The tool rapidly reviews engagement data, external reports, and third-party feedback, giving us accurate insights without manual research. This enables faster, deeper understanding and supports better, value-for-money decision-making.



1. Delivering an environmentally sustainable network

It's our ambition to help communities and the environment thrive by delivering reliable, affordable and sustainable energy that will help power a green recovery and get the UK to net zero.

Key Performance Statistics



410km
of metallic gas mains replaced in 2024-25 to more durable pipes with a lifespan of 80+ years



Installed a total of 69
vehicle charging points in our sites up to March 2025



99.8%
of our waste was reused and recycled in 2024-25



Did you know?

We have 22 biomethane connections providing enough capacity to meet the equivalent demand of more than 160,000 homes.



[Read our latest Annual Environmental Report here](#)



Case study

HyLine Cymru

Identify

South-west Wales is home to heavy industry that produces a large share of the total carbon emissions from Wales. To cut these emissions and protect thousands of jobs, the region needs a reliable supply of low-carbon energy. The HyLine Cymru Project was created to meet this need by building a 130km hydrogen pipeline from Pembroke Dock to Port Talbot.

Analyse

Partners in the South Wales Industrial Cluster (SWIC) worked together to design a solution that supports industry, communities, and the economy. The project combines innovation with additional investment beyond regulatory funding to make the pipeline viable and future ready.



Deliver

HyLine Cymru will connect hydrogen producers to major industrial users, enabling fuel switching and decarbonisation. The pipeline will also unlock new clean energy projects, such as offshore wind, by providing a route to market for green hydrogen.

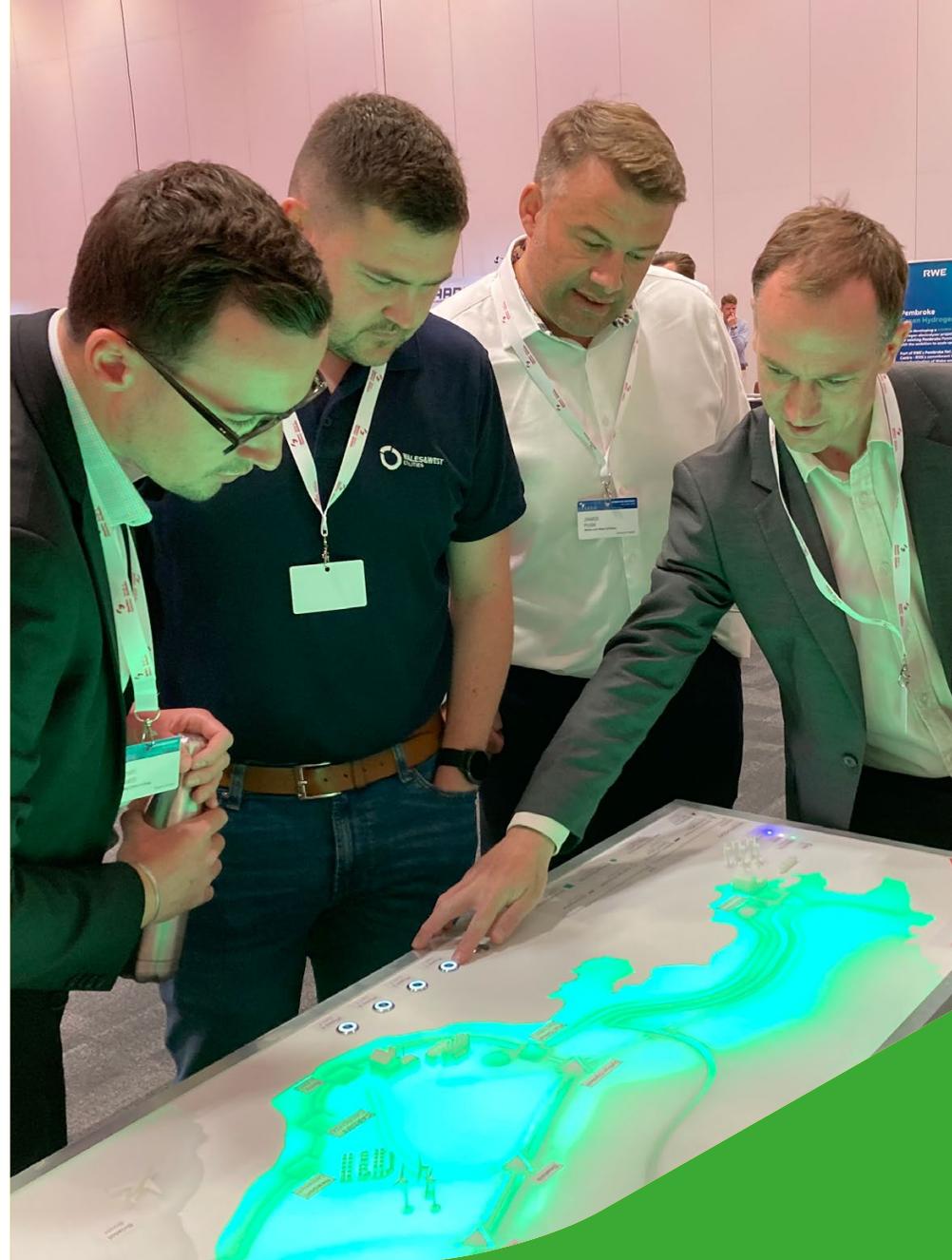
Evaluate

The benefits are significant:

- Potential savings of up to 3.2 million tonnes of CO₂e per year.
- It's an opportunity to protect and create thousands of skilled jobs in Wales.
- Contributing to the development of a green industry and energy hub within Wales.
- Worth billions in economic value over its lifetime.
- It will help local authorities to deliver their energy plans.
- Hard-to-decarbonise sectors like steel manufacturing will be supported.

HyLine Cymru is a major step toward a greener future – reducing emissions, supporting communities, and driving economic growth.

[Please click here for further information on our Hyline Cymru Report](#)





2. Maintaining a safe and resilient network

Keeping customers safe and warm starts with a reliable gas network. Our role as the gas emergency service plays a vital role in protecting homes and businesses by responding quickly to leaks and urgent situations. At the same time, ongoing investment in upgrading the network both ensures that energy continues to flow safely today and we are ready for the future. These improvements are safeguarding communities while preparing the network to transport green gases like hydrogen and biomethane – in support of a cleaner, more sustainable energy system for customers.

Key Performance Statistics



More than 10,000
carbon monoxide
alarms provided to
customers in
vulnerable situations



90,000
gas emergencies
attended annually



**Reached 2.7m
individuals**
(over 1.1m homes)
with carbon monoxide
awareness messaging

Did you know?

We educated more than 18,000 people on gas safety through our in-house educational programme in 2025.





Case study

Consistent dedication to the highest health and safety standards

Identify

Maintaining a safe and resilient gas network is one of our core commitments – and a top priority for our stakeholders and customers. This commitment has been reaffirmed by achieving our twelfth consecutive Gold Award from the Royal Society for the Prevention of Accidents (RoSPA), a globally respected recognition of health and safety excellence.

Analyse

Safety is not just a regulatory requirement; it is a fundamental expectation of the communities we serve. The RoSPA Awards recognise organisations that go beyond compliance to embed a culture of safety. Our twelve-year track record demonstrates that we consistently deliver on this expectation, ensuring our network remains robust, reliable, and ready for the future.



Deliver

We operate the gas emergency and pipeline service for 7.5 million people across Wales and the south-west of England, making sure homes and businesses stay safe and warm. Our work includes:

- responding to gas emergencies swiftly and effectively
- connecting new homes and businesses to the network
- upgrading infrastructure to keep it safe today and ready for green gases like hydrogen and biomethane in the future.

Evaluate

The RoSPA Health and Safety Awards is the largest occupational health and safety awards programme in the UK, attracting nearly 2,000 entries annually from almost 50 countries, with a reach of over seven million employees. Securing 12 consecutive Gold Awards positions us among the most trusted organisations in the sector. Our achievement reinforces our pledge to keep safety at the heart of everything we do – for our customers, our stakeholders, and our communities.

[Please click here for more information](#)



Which are the most important areas of focus for our stakeholders?



Annual Stakeholder Workshop October 2025



3. Meeting the needs of consumers and network users

We're committed to understanding what matters most to our consumers so we can not only meet but exceed their expectations. A key priority is addressing the needs of those in vulnerable situations, ensuring they receive the support needed to stay safe and warm.

Key Performance Statistics



Customer satisfaction

score of 9.21 in 2025

229,105



people reached directly through our Vulnerability and Carbon Monoxide Allowance (VCMA) projects



Maintained

our British Standard for Inclusive Service Provision



Did you know?

In year four, we boosted our VCMA investment to £9.58m, due to the repurposing of the Fuel Poor Network Extension Scheme (FPNES).





Investing back into communities

Identify

We needed to upgrade the gas mains in Shaldon, South Devon, to ensure a safe, reliable supply for homes and businesses in the local area. This £500,000 infrastructure investment was essential to maintain network integrity and prepare for future low-carbon gases like biomethane and hydrogen.

Analyse

While these works were critical for safety and resilience, we recognised they would cause disruption to the local community. Our stakeholder engagement highlighted the importance of leaving a positive legacy and supporting local priorities, such as enhancing community spaces and biodiversity.



Deliver

To give back to the community, we partnered with local stakeholders to support improvements to the newly refurbished play park on the local playing field. Our donation was used to create a “living willow wigwam” and introduce pollinator-friendly trees and plants – boosting biodiversity and making the park more enjoyable for all ages.

Evaluate

The project delivered multiple benefits:

- **Safety and reliability:** The upgraded gas mains reduce risk and make sure the supply will be continuous.
- **Future-proofing:** Preparing the network for greener gases supports the UK’s net zero ambitions.
- **Community impact:** Our contribution enhanced a valued local space and improved biodiversity. We demonstrated our commitment to reinvesting in areas affected by our work.

[Please click here for more information](#)





4. Delivering value for money

Providing cost-effective services to our customers while keeping the gas running more efficiently and sustainably is as important as ever. Our innovation work is vital for decarbonising the network while, at the same time, keeping costs as low as possible for consumers.

Key Performance Statistics



In 2024-25,
36 Network Innovation Allowance
projects commenced

Keeping bills low



was the highest priority for domestic customers maintained over multiple years, reflecting strong customer demand for affordable energy costs



Our tree planting projects created **£3.2m of value** in carbon removal and other social benefits



Did you know?

We invested £6.3m in energy system transition innovation projects in 2024-25.



Case study



NextGen Electrolysis – Wastewater to Green Hydrogen

Identify

Reducing the cost of green hydrogen can help meet the UK's net zero targets. Current methods need clean energy like solar or wind, very pure water, and special equipment to clean that water. They also use membranes often made from rare metals to split water into hydrogen and oxygen.

In our NextGen Electrolysis project we've already shown that new membranelles technology can make green hydrogen using less pure water. Now, we're moving to the next stage: testing how this can work on a bigger scale and how it could fit into future development of the UK's gas network, to reduce the emissions associated with the use of gas.

Analyse

We're now in the beta phase, developing two exciting trials:

Welsh Water

At their wastewater works in South Wales, we're using effluent and sea water, along with the site's solar power, to make hydrogen for heating and hot water in the office building. This will show us what it takes for an industrial site to run entirely on hydrogen for these everyday needs.

Yeo Valley

Here, we're using solar power and different water sources – like process water, rainwater, and borehole water – to produce hydrogen. We'll blend up to 20% hydrogen with natural gas in the boilers used to make yoghurt. This trial will help us understand how hydrogen can work alongside existing systems and what's needed to keep operations safe and efficient.



Deliver

What will these trials tell us?

- How well small-scale hydrogen production works in real industrial settings.
- What challenges we need to overcome to make this practical.
- How blending hydrogen with natural gas could work safely and efficiently.
- The benefits of using less pure water and locating production close to where it's needed.

Evaluate

Why does this matter?

- **Saving water:** By removing the need for purification, we could save 1.5 million litres for every GWh of hydrogen produced.
- **Lower costs:** Using waste heat and oxygen from the process could cut costs and improve efficiency.
- **Cutting carbon:** Helps businesses reduce emissions and supports the UK's journey to net zero.
- **Future-ready:** Extra hydrogen could be blended into local gas networks, making the transition smoother for everyone

By advancing this technology, we aim to enable lower-cost green hydrogen production, accelerating the transition to a sustainable energy future.

[Please click here for more information](#)



If you have an idea that aligns with our key themes, [please contact us](#)

Looking ahead to our next business investment period (GD3)

Strategic priorities for 2026 – 2031

As GD2 comes to a close, we're proud of the progress we've made in delivering a safe, reliable, and customer-focused gas network. We've strengthened our relationships with stakeholders, invested in innovation, and taken meaningful steps toward decarbonisation – all while maintaining high levels of customer satisfaction and operational performance.

But we know there's more to do.

GD3 presents a pivotal opportunity to build on these foundations. Guided by the insights and priorities of our communities, we're committed to evolving our services to meet future challenges. Whether this is supporting the transition to net zero, enhancing affordability, or improving resilience in the face of climate change, our strategy for GD3 is shaped by what matters most to the people we serve.

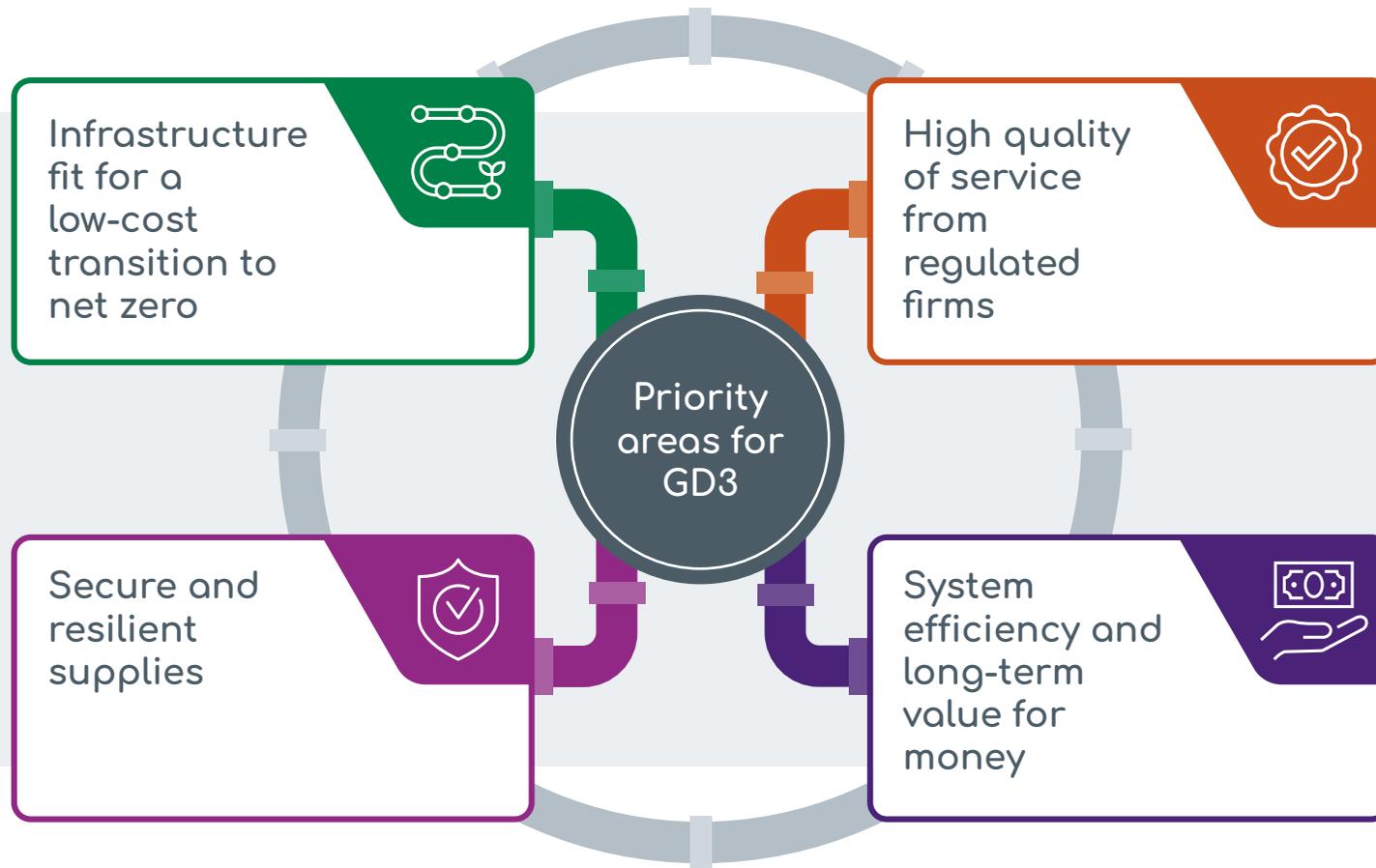
We're entering this next phase with renewed ambition and a clear focus: to deliver long-term value through a network that is safe and sustainable, and is also inclusive, innovative, and responsive.

The infographic on the next page sets out the GD3 priority areas that Ofgem assigned to gas distribution networks.



Our GD3 priority areas

These are the priority areas where we will concentrate our efforts to ensure we deliver long-term value and resilience for the customers we serve today and in the future.



Our other reports

For further insights, please click any of the reports below:



[Annual Environmental Report 2024-2025](#)



[Innovation Report 2024-25](#)



[2025 Long Term Development Statement](#)



[Vulnerability and Carbon Monoxide Report 2024-25](#)



[GD3 Business Plan 2026-31](#)

Closing remarks

Looking back, moving forward

“As GD2 draws to a close, we want to thank you – our stakeholders – for your continued trust and partnership throughout this journey. Your support has been instrumental in enabling us to deliver strong outcomes and create meaningful impact. Behind these achievements stand dedicated colleagues whose commitment and collaboration have ensured that GD2 met its ambitious goals.

“Looking ahead, GD3 represents an exciting new chapter. It will build on the successes of GD2 while introducing fresh opportunities to innovate, strengthen partnerships, and deliver even greater value. We are eager to work with you as we embark on this next stage and shape a future that reflects our shared vision.”

Gwyn Thomas



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