



CUSTOMER SATISFACTION SURVEY 2025

GTS Management of Authorization and Systems

November 2025

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1. Conclusions and actions for improvement



The present report includes the results obtained from the satisfaction survey sent by the Technical System Manager (GTS) last October to the active clients of the Spanish gas system during the 2025 gas year. As in previous years, the rating scale is from 1 to 10. Highlight the following relevant aspects:

- ✓ **Improvement in the Net Promoter Score (NPS), that increased to 75% from 43% last year.**
- ✓ The correlation between satisfaction and importance given to each item indicates excellence among all topics.
- ✓ **Most average ratings score over 9**, being the exception the functioning of the SL-ATR, nearing a score of 9.
- ⇒ Taking into account the results obtained in the study conducted this year, it is worth highlighting that for the 2027-2029 period, the **GTS faces a scenario of increasing functional complexity**, arising from the assumption of new regulatory responsibilities, the **strengthening of cybersecurity and licensing** (as a result of regulatory requirements that involve the modification of SL-ATR modules), the **integration of renewable gases**, and the **digitization** of critical processes. Hence, the ambitious investment plan for the period aims at the renewal, functional adaptation, improvement of cybersecurity, and strengthening of the resilience of the SL-ATR 3.0 system.

2. Background

In **Circular 6/2021, dated June 30, from the CNMC**, modified afterwards by Circular 3/2025, the incentives for the GTS affecting its remuneration are established. This Circular defines a series of indicators related to the performance of its functions by the GTS.

One of them is the **I5 'Performance Indicator in relation to the quality of assistance to system agents (I5) '**.

The evaluation of this indicator is carried out through a **survey validated by the CNMC**, which quantifies the efficiency of the GTS's actions in relation to the assistance provided to agents.

The survey requires a **participation level of at least 30%** and must be completed **by subjects considered active**, as indicated in the aforementioned Circular, which for the 2024 gas year amounts to **248 active subjects**.

Survey structure

Available in annexes

Section I. Mandatory for the calculation of I5

- Block 1. ATR
- Block 2. Balance
- Block 3. Operation

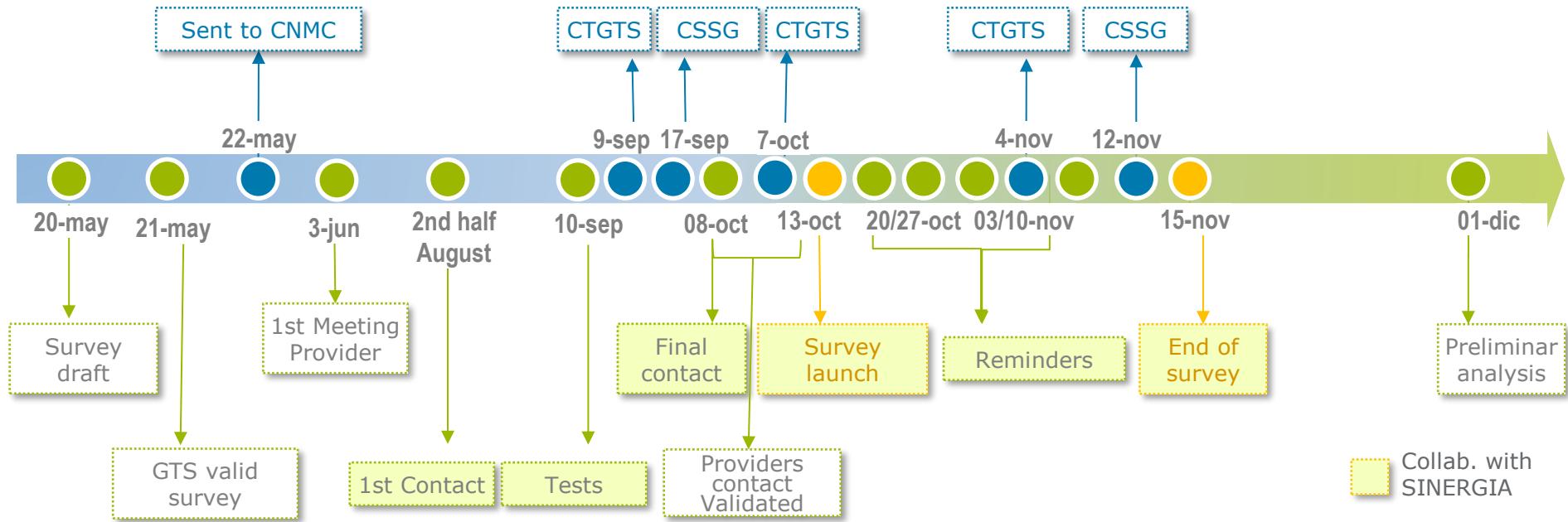
Section II. Optional. General matters

GTS commitment to continuous improvement



See survey in the annexes of this document [link](#)

3. Timeline



- The launch date was October 13, with a deadline until November 15 inclusive.
- External support with the SINERGIA GROUP: automation, **guarantee anonymity of responses**, user support in resolving issues when completing the survey, sending email reminders...
- 248 surveys were sent in Spanish and English, accessible from computer, tablet, and mobile.
- **The GTS encouraged agents to participate in the survey in various forums: CSSG and CTGTS Group.**

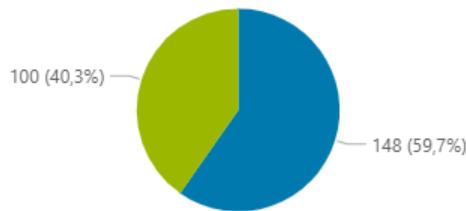
4. Participation

Goal: 30% participation → 75 valid surveys

Achieved: 40% participation → 100 valid surveys

Participation

● Not answered ● Complete



Of the **248** active subjects, the results once the survey was closed were:

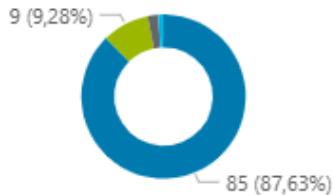
- **100** completed the survey validly
- **148** did not complete the survey

Circular 6/2021 of the CNMC establishing the incentives for the GTS.
Art. 3 definitions: Valid survey: Satisfaction survey submitted to the technical system manager within the established deadline, by a gas system agent uniquely identifiable, in which at least half of the questions in each block of the survey corresponding to the activity carried out within the gas sector have been completed.

5. Typology of subjects

Activity

- Shipper or Direct Ma...
- Carrier
- Distributor
- Market Operator



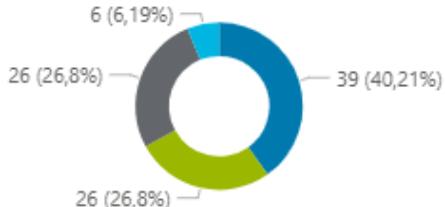
Position held within the company

- Middle managem...
- Technician
- Executive Manag...
- Other



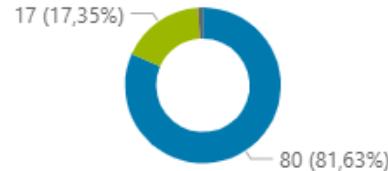
Type of company

- Small (<=50 p)
- Large (> 250 p)
- Medium (<= 250 p)
- Micro (<=10 p)



Seniority in the company

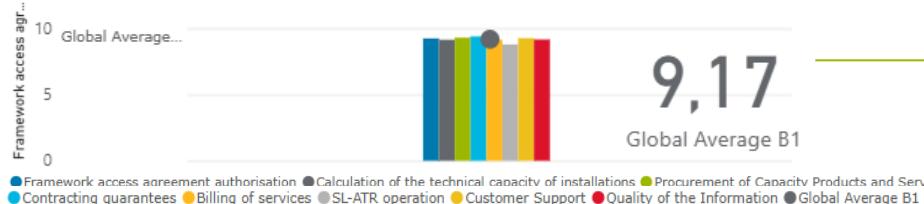
- More than three t...
- One to three years
- Less than one year



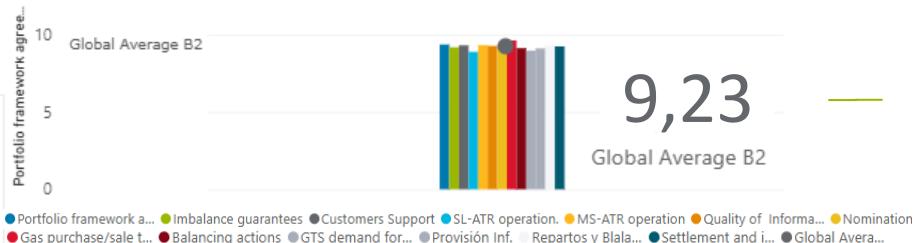
- The average profile of the person who responded to the survey corresponds to a technician or middle manager, with more than three years of experience, from a small/medium-sized marketer.

6. Incentive Calculation

Section 1. ATR



Section 2. Balances



Section 3. Operation



- In an initial analysis of the information received, the following points stand out:

- The ratings for all questions are high**, above 9 (except for the performance of the SL-ATR in Block 1 ATR, which scored 8.8, as well as in Block 2 Balances).

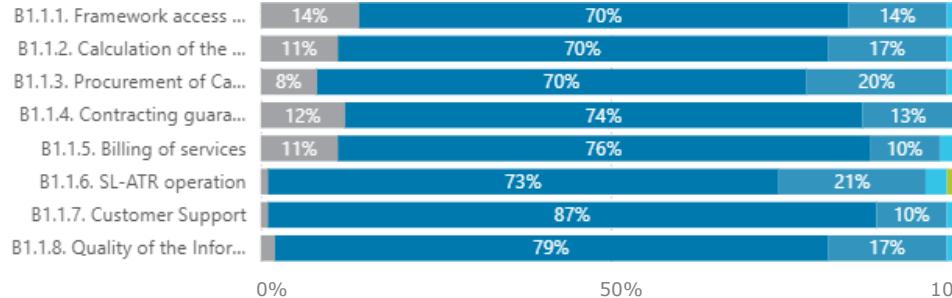
- Among the **best-rated aspects** (around 9) are:
 - Block 1 ATR → customer service and authorization, as in the previous year.
 - Block 2 Balances → operations and notifications of gas purchase/sale between users on market platforms, as in the previous year, along with customer service.
 - Block 3 Operation: supply security and management before SOEs, as in the previous year."

Overall ratings were very positive.

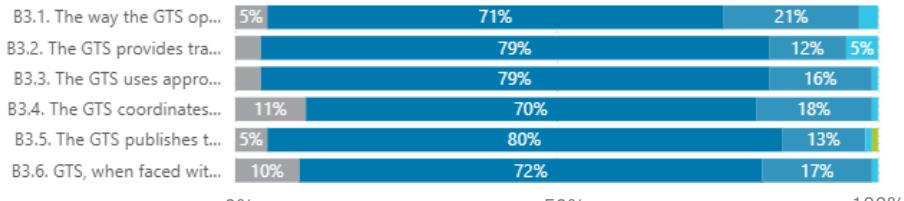
The score of 9.2 would have been 8.7 if all direct consumers in the market were not counted.

7. % Satisfaction

Block 1. ATR

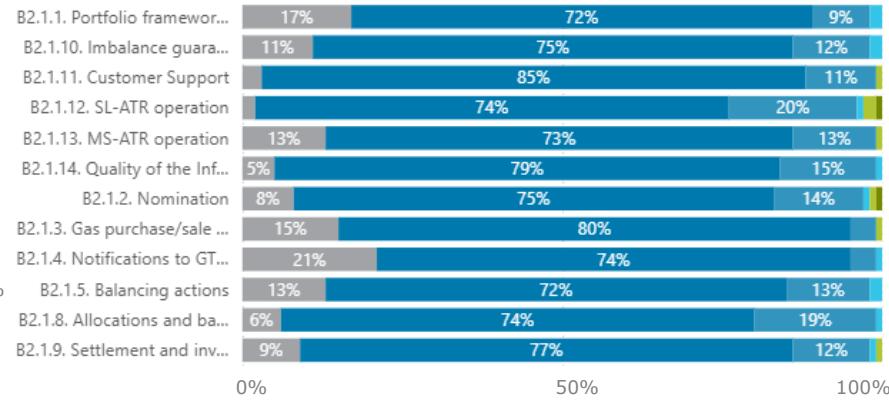


Block 3. Operation



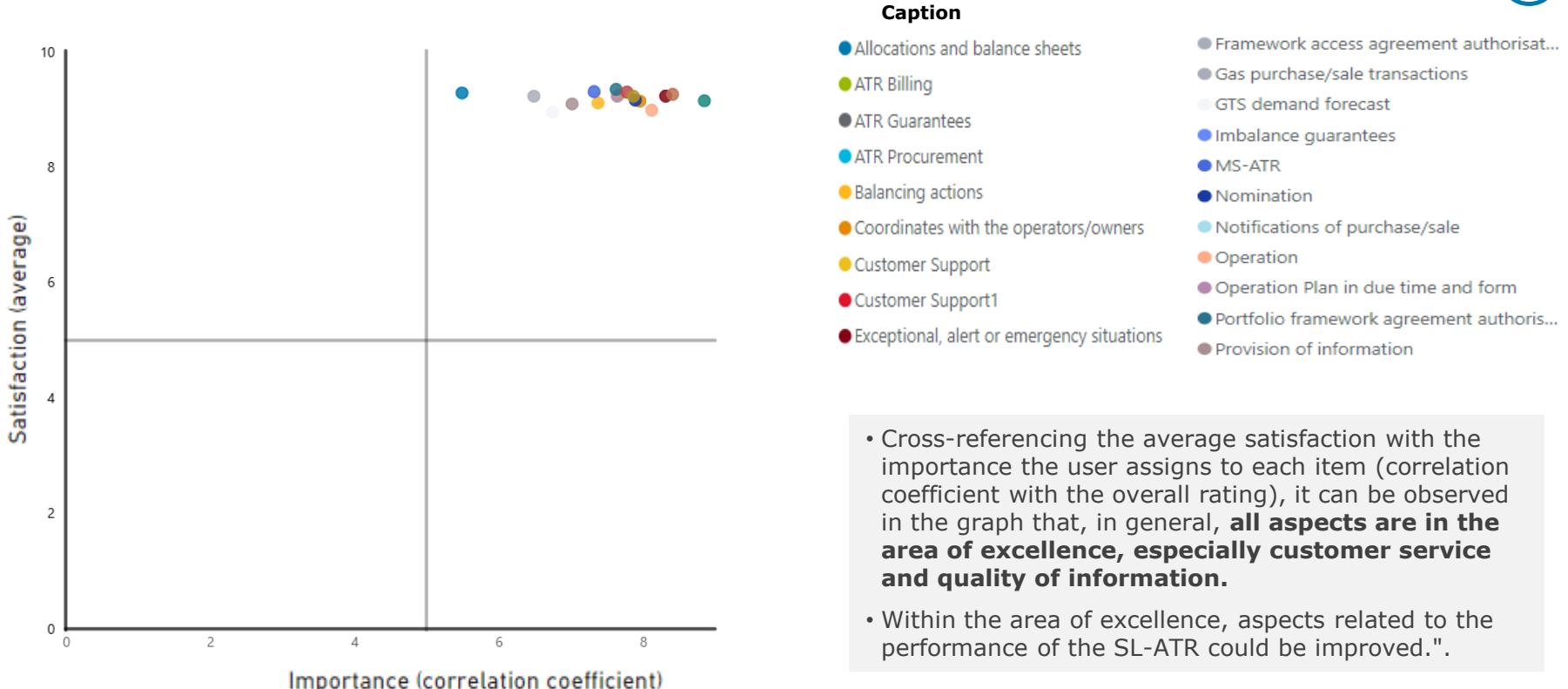
● % 1 y 2 ● % 3 y 4 ● % 5 y 6 ● % 7 y 8 ● % 9 y 10 ● NS/NC y NA

Block 2. Balance



- In all three blocks, for each survey item, **more than 70% of the responses have scores of 9 or higher**, except for the 'SL-ATR performance,' both in Block 1 ATR and Block 2 Balances.
- It is noteworthy that in Block 1, **Customer Support reaches 87%**, which every year is consistently a strong point.

8. Importance vs. Satisfaction Matrix

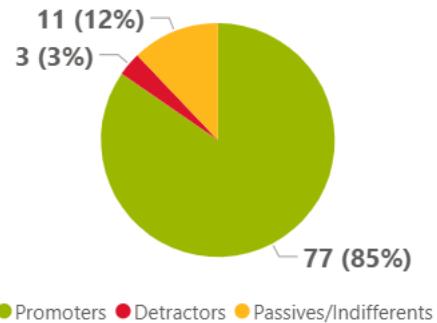


9. NPS: Net Promoter Score

The NPS indicator in customer experience programmes is used to determine the level of recommendation of customers to a company through a survey question. In our case through the following statement:

'I consider the level of provision of our services to be equal or superior to other system operators in the energy sector'.

Nº y % of PR, DE and PA/I



-  **PR:** Promoters, those who respond by allocating 9 or 10 points
-  **PA/I:** Passive or indifferent, those who allocate 7 or 8 points
-  **DE:** Detractors, those awarding 6 points or less

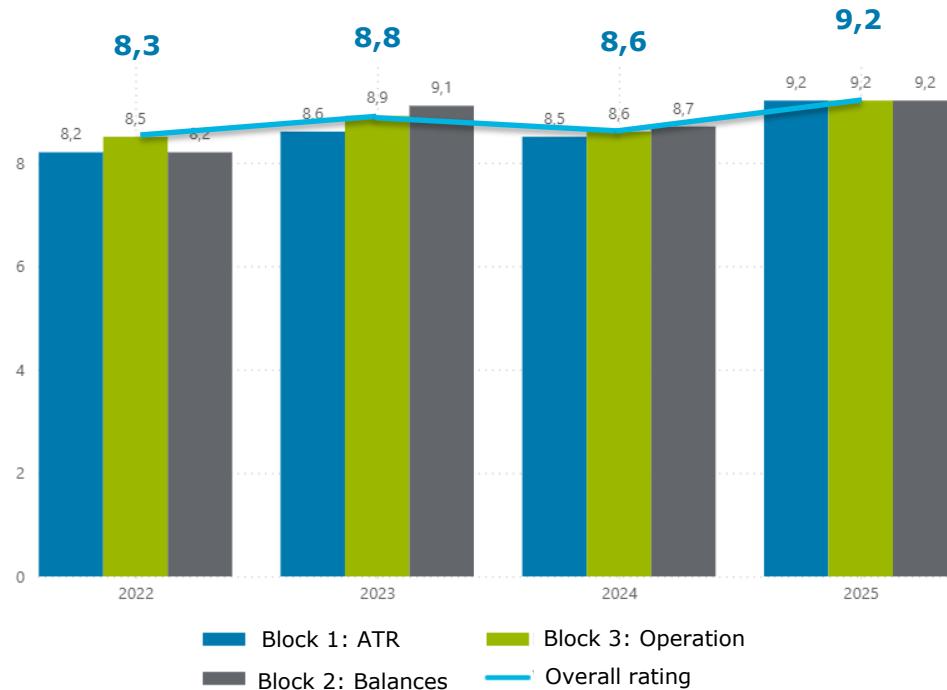
NPS 2025:



NPS 2024: 47%

$$\text{NPS} = \frac{\text{PR} - \text{DE}}{\text{Total}}$$

10. Evolution of overall and block ratings



- The trend on recent years has been positive, although there was a small decrease from 2023 to 2024 that was compensated on 2025. This trend is present in every block.

Annexes:



- Survey 2025

Enagás GTS Customer Satisfaction Survey



Section I:

3 BLOCKS (*for the calculation of the incentive= $I_{5,i}$*)

$I_{5,1}$

1. Third-party access
to system facilities

8 multiple choice
questions2 open questions

$I_{5,2}$

2. Balance of users and
the system

14 multiple choice questions
2 open questions

$I_{5,3}$

3. System
operation

8 multiple choice questions
2 open questions

✓ *Participants: all active subjects*

Section II:

Overall assessment

General (does not apply
to the calculation of
incentives)

5 multiple choice questions1
open question

Enagás GTS Customer Satisfaction Survey



BLOCK I: THIRD PARTY ACCESS TO THE SYSTEM

The questions in this block are aimed at finding out your assessment of the assistance provided and the quality of the information communicated in relation to the processes related to third-party access to the system (access to gas system facilities), mainly: contracting, auctions and capacity allocation, guarantees associated with the contracting process, billing of associated services by the GTS and customer service.

B1.1. Rate the satisfaction of each of our services (1 being the lowest and 10 the highest) in relation to access to the gas system facilities during the last gas year (octubre de 2023 a septiembre de 2024)

	1	2	3	4	5	6	7	8	9	10	N/A
Framework access agreement authorisation	0	0	0	0	0	0	0	0	0	0	0
Calculation of the technical capacity of installations	0	0	0	0	0	0	0	0	0	0	0
Procurement of Capacity Products and Services	0	0	0	0	0	0	0	0	0	0	0
Contracting guarantees	0	0	0	0	0	0	0	0	0	0	0
Billing of services	0	0	0	0	0	0	0	0	0	0	0
SL-ATR operation	0	0	0	0	0	0	0	0	0	0	0
Customer Support	0	0	0	0	0	0	0	0	0	0	0
Quality of the Information	0	0	0	0	0	0	0	0	0	0	0

B1.2. Would you like to add any comments or clarify the scores you have assigned to any of the above questions? If in any of the answers you gave a score lower than 5, it would be very helpful if you could tell us the reason for this score. (This is an open answer and does not count as an incentive)

B1.3. Is there any other relevant aspect related to access to gas system facilities that you feel should be included in indicator I₃? (This is an open answer and does not count as an incentive)

BLOCK II. USER BALANCE AND SYSTEM BALANCE

The questions in this block are focused on finding out your assessment of the attention provided by the GTS with respect to user balancing and system balancing, mainly: authorisation in the balance portfolio framework contract, user groupings, use of contracted capacity, gas purchase/sale operations, provision of information, distribution and balancing, guarantees associated with imbalance, invoicing and settlement of imbalances, carrying out balancing actions and customer service.

B2.1. Please rate the satisfaction (being 1 the lowest and 10 the highest) of each of our services in relation to the following processes associated with the balancing of users and the system during the last gas year (octubre 2023 to septiembre 2024)

	1	2	3	4	5	6	7	8	9	10	N/A
Portfolio framework agreement authorisation	0	0	0	0	0	0	0	0	0	0	0
Nomination	0	0	0	0	0	0	0	0	0	0	0
Gas purchase/sale transactions between users in the MS-ATR	0	0	0	0	0	0	0	0	0	0	0
Notifications to GTS of purchase/sale of gas between users in Marketplace platforms	0	0	0	0	0	0	0	0	0	0	0
Balancing actions	0	0	0	0	0	0	0	0	0	0	0
Provision of information	0	0	0	0	0	0	0	0	0	0	0
GTS demand forecast	0	0	0	0	0	0	0	0	0	0	0
Allocations and balance sheets	0	0	0	0	0	0	0	0	0	0	0
Settlement and invoicing of imbalances	0	0	0	0	0	0	0	0	0	0	0
Imbalance guarantees	0	0	0	0	0	0	0	0	0	0	0
Customer Support	0	0	0	0	0	0	0	0	0	0	0
SL-ATR operation	0	0	0	0	0	0	0	0	0	0	0
MS-ATR operation	0	0	0	0	0	0	0	0	0	0	0
Quality of the Information	0	0	0	0	0	0	0	0	0	0	0

B2.2. Would you like to add any comments or clarify any of the scores you have assigned to any of the above questions? If you gave a score lower than 5 for any of the questions, it would be very helpful if you could tell us the reason for this score. (This is an open answer and does not count as an incentive)

B2.3 Do you miss any relevant aspects related to user and system balance that should be counted in indicator I₃? (Open-ended and not eligible for incentive)

Enagás GTS Customer Satisfaction Survey



BLOCK III. SYSTEM OPERATION

The questions in this block are aimed at obtaining your assessment of the attention given by the GTS to the operation of the system.

B3.1. The way the GTS operates the system is efficient:

1	2	3	4	5	6	7	8	9	10	Not applicable
Disagree	0	0	0	0	0	0	0	0	0	0
	Agree									

B3.2. The GTS provides transparency to the operation of the System, preserving the confidentiality of commercial information:

1	2	3	4	5	6	7	8	9	10	Not applicable
Disagree	0	0	0	0	0	0	0	0	0	0
	Agree									

B3.3. The GTS uses appropriate means to ensure security of supply:

1	2	3	4	5	6	7	8	9	10	Not applicable
Disagree	0	0	0	0	0	0	0	0	0	0
	Agree									

B3.4. The GTS coordinates with the operators/owners of the facilities in an appropriate manner:

1	2	3	4	5	6	7	8	9	10	Not applicable
Not satisfied at all	0	0	0	0	0	0	0	0	0	0
	Completely satisfied									

B3.5. The GTS publishes the Operation Plan in due time and form:

1	2	3	4	5	6	7	8	9	10	Not applicable
Disagree	0	0	0	0	0	0	0	0	0	0
	Agree									

B3.6. GTS, when faced with "exceptional, alert or emergency" situations, acts effectively.

1	2	3	4	5	6	7	8	9	10	Not applicable
Disagree	0	0	0	0	0	0	0	0	0	0
	Agree									

B3.7. The information contained in the transaction notes is clear:

1	2	3	4	5	6	7	8	9	10	Not applicable
Disagree	0	0	0	0	0	0	0	0	0	0
	Agree									

B3.8. The quality of the information provided is adequate:

1	2	3	4	5	6	7	8	9	10	Not applicable
Disagree	0	0	0	0	0	0	0	0	0	0
	Agree									

B3.9. Would you like to add any comments or clarifications on the scores you have assigned to any of the above questions? If in any of the answers you gave a score lower than 5, it would be very useful if you could tell us the reason for this score. (This answer is open-ended and does not count as an incentive)

B3.10. Do you miss any relevant aspect related to the operation of the system that should be counted in indicator 1s. (Open-ended and not eligible for incentive)

SECTION II: GENERAL ASSESSMENT

The questions in this block are focused on obtaining your general assessment of the attention provided by the GTS and do not compute for the incentive. Please answer the following questions:

II.1 Position held within the company:

- a. Technician
- b. Middle management
- c. Executive
- d. Other

II.2 Seniority in the company:

- a. Less than one year
- b. From one to three years
- c. More than three years

II.3 Number of employees in the company:

- a. Microenterprise (<=10 people)
- b. Small company (<=50 people)
- c. Medium-sized company (<= 250 people),
- d. Large company (> 250 people)

II.4 Indicate the degree of overall satisfaction with the services provided by the GTS (1 being the lowest and 10 the highest)

1	2	3	4	5	6	7	8	9	10	Overall rating
Disagree	0	0	0	0	0	0	0	0	0	Very likely

II.5 Indicate your degree of agreement with the following statement: I consider that the level of provision of our services is equal to or higher than that of other system operators in the energy sector (1 being the lowest and 10 the highest)

1	2	3	4	5	6	7	8	9	10	Not applicable
Disagree	0	0	0	0	0	0	0	0	0	0
	Agree									

II.6 What would you suggest we do to improve your customer experience? (This answer is open-ended)

Thank you

