national gas

Securing Britain's Energy.

Gas Summer Outlook 2026 →

All data is as of 14 April 2026

Welcome

We published the Gas Summer Outlook 2026 as an interactive document.

Getting more from our data
Additional information relating to the data shared in this publication is available separately on our website.

How to use this document

Home
This will take you to the home page.

Arrows
Click on the arrows to move to previous or next page.

Enlarge/reduce
Hover over the magnifying icon to make charts bigger or smaller.

'Linked' content
Words highlighted in green and underlined have links to other pages in this document, or are URLs.

Welcome to this year's Gas Summer Outlook.

National Gas is the owner and operator of Great Britain's national gas network – a critical part of the country's energy infrastructure. We play a vital role in ensuring gas is transported safely, reliably and securely from where it enters our network to where it is needed, helping to keep the lights on, industries powered and homes warm.

While National Gas is not responsible for the procurement of Britain's gas supply, as the Gas System Operator with responsibility for system planning, we routinely publish demand and supply forecasts to inform the market.

This Gas Summer Outlook focuses on the summer period from April to September 2026 and sets out our assessment of gas supply and demand over the months ahead.

Summer is typically characterised by lower overall gas demand compared to winter, and Britain enters this period with a diverse and resilient supply mix. As a result, our forecast expects there to be sufficient supply to meet demand over the summer months in normal operating conditions.

This forecast was prepared ahead of the escalation of the conflict in the Middle East. In recognition of the importance of global markets to Britain's energy mix, we have since reviewed our forecasts and included additional analysis in this Summer Outlook. While the situation has understandably raised questions about Britain's gas supplies, our revised assessments indicate the market has the capacity to deliver sufficient supply to meet demand this summer, meaning we have no immediate operational concerns. This operational picture is underpinned by lower seasonal demand for gas alongside a diverse and resilient supply mix.

This remains a rapidly evolving situation. We will continue to monitor developments with a view to providing further analysis in our upcoming Gas Winter Review and Gas Winter Outlook publications should it be necessary.

Looking further ahead to winter, we recognise, alongside government, NESO, industry and regulators, that Britain's gas supply landscape is continuing to evolve.

Our Winter Outlook 2025, NESO's Gas Supply Security Assessment and our response to the Government's Gas System in Transition: Security of Supply consultation set out the near- and long-term challenges facing the system as UK Continental Shelf (UKCS) supplies decline and operational margins tighten. It is important that ongoing, coordinated action between government, industry and regulators continues to address these challenges.

In the short term, this makes our routine programme of maintenance work undertaken over the summer period even more important.

We continue to work closely with partners to prepare the system for the months ahead, develop future solutions that will maintain security of supply, and support Britain's energy transition.

Glenn Bryn-Jacobsen
Director of Energy Systems & Resilience

About us

Our primary responsibility is to transport gas safely, efficiently and reliably across the NTS, by managing the day-to-day operation of the network.

Other publications in this suite:

- Gas Winter Review and Consultation published annually in June.
- Gas Winter Outlook published annually in September/ October.
- Gas Ten Year Statement (GTYS) published annually in November.

National Gas is securing Britain's energy

We are responsible for transporting gas to power stations, major industries, GB storage facilities, more than 500,000 businesses, and 24 million homes through nearly 5,000 miles of pipes across Britain.

Gas is an essential part of a secure energy supply in Great Britain and will continue to play a vital role for decades to come. More than ever, we need the security that gas brings to keep the lights on, businesses running, and to protect jobs. National Gas provides that security.

National Gas is also proud to lead the way in transforming the energy network for a net zero future. Gas provides the energy security to support renewable electricity generation, and we are developing our infrastructure to transport hydrogen and carbon dioxide across the country.

We work closely with government, regulators (including Ofgem), national advisory bodies and the National Energy System Operator (NESO) to ensure we deliver safe, reliable energy across the country, while developing sustainable energy systems for the future.

Our role

National Gas is the owner and operator of the gas National Transmission System (NTS) in Great Britain. Our licence is established under the Gas Act 1986. This requires us to develop, maintain and operate economic and efficient networks and to facilitate competition in the supply of gas in Great Britain. In our role as the National Transmission System (NTS) Owner and Operator, we have three key responsibilities:

Infrastructure provider – The operational configuration of the NTS infrastructure requires additional flexibility during the winter period, to ensure it can transport enough gas to meet the increased demand associated with the colder months. Gas supplies are driven by market dynamics and global prices, which have been particularly volatile in recent years – we are preparing the network, particularly our compressors, to ensure they can react to changing market conditions and subsequent supply patterns.

Market facilitator – The underlying market arrangements in Great Britain are established on the basis that the market will provide the gas itself, and that the market will balance supply and demand. Throughout the winter period, we conduct daily assessments of gas margins and communicate this to the industry via our market information portal. We also produce publications throughout the year, such as this one, to share information relating to the NTS (both short and longer term) with our stakeholders to support their own planning and operational activities.

Residual balancer – When there is an imbalance between supply and demand, we act as residual balancer by taking energy balancing actions via the On The Day Commodity Market (OCM). These title trades can set the system marginal price and encourage shippers who are out of balance to take actions themselves and, if required, we can also look to locationally trade at specific entry points to change the physical flow rate of gas.

In the unlikely event there is insufficient supply to meet demand, and the market is unable to resolve the imbalance, we have the tools we need to ensure the safety and integrity of the gas should there be a Gas Supply Emergency. These emergency tools include requesting additional gas supplies be delivered to the NTS or requiring gas consumers (starting with the largest industrial consumers) to reduce or stop using gas. These tools will be used, if required, subject to authorisation by the Network Emergency Coordinator.

Read more about our role & responsibilities in the appendix

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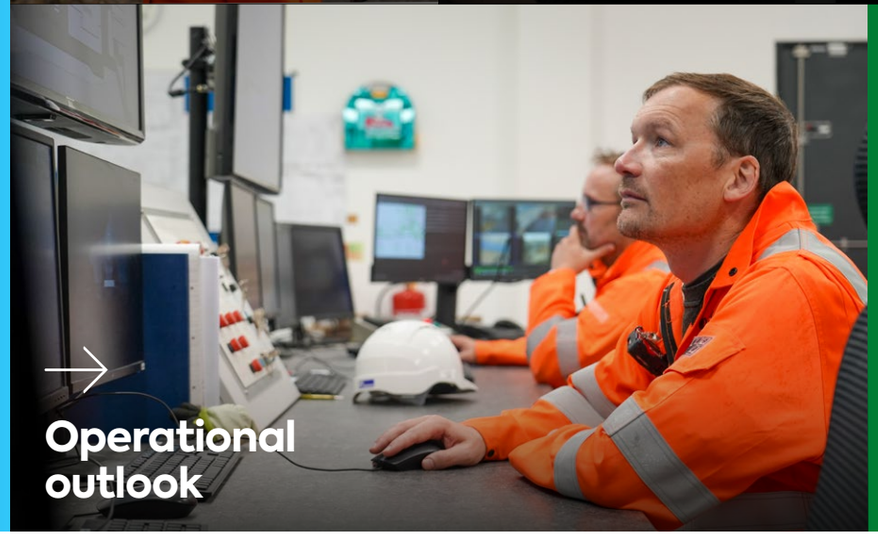
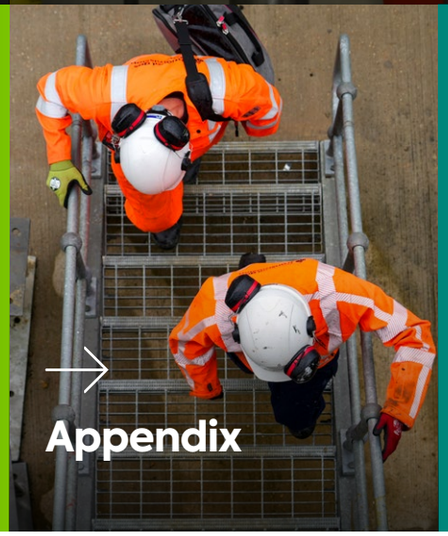


Operational outlook

Contact us



Appendix

Glossary

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Key messages

Executive summary

Key messages

1. Great Britain's demand and total gas demand for summer 2026 are forecast to be comparable to summer 2025, with a small decrease in gas for electricity generation (-6%), largely offset by an increase in non-daily metered (NDM) (+2%).

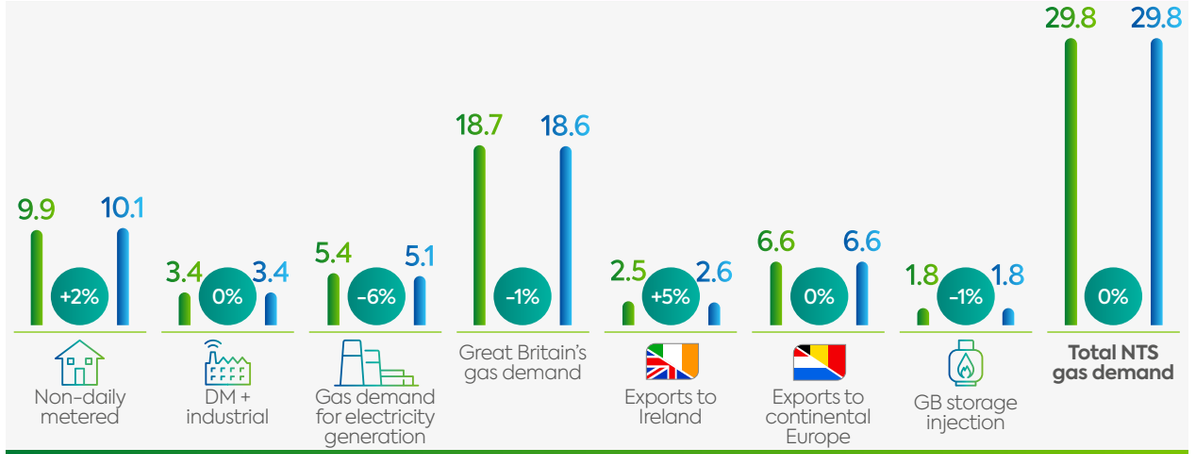
2. While gas demand for electricity generation is lower during the summer, it is increasingly volatile. We see large swings occur both day-to-day and within the day, as gas-fired power stations respond to variability in weather-driven renewable generation and overall electricity demand.

3. We expect there to be sufficient supply to meet demand this summer, with demand primarily met by supplies from the UK Continental Shelf (UKCS) and Norway, with the balance being secured from LNG and GB storage.

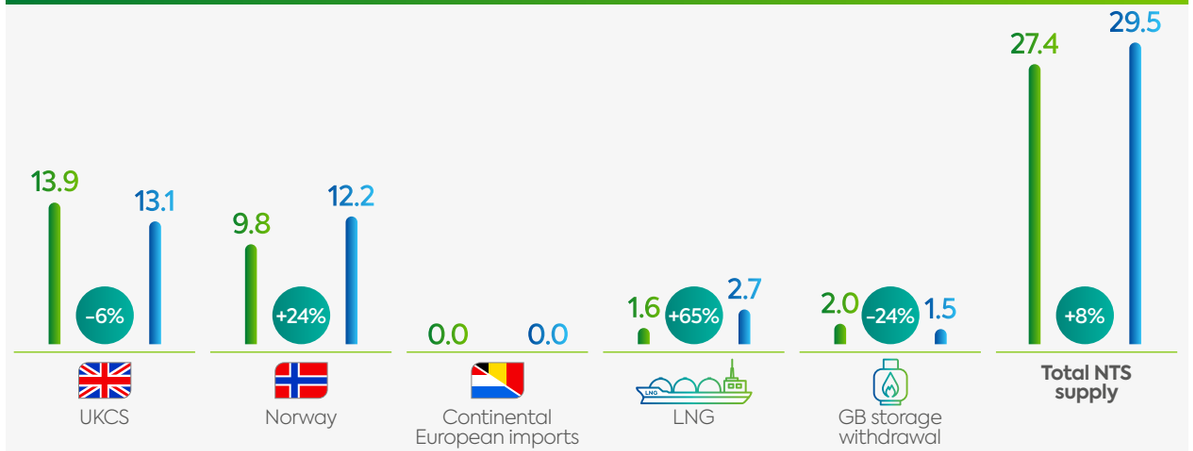
4. Whilst we will do everything we can to avoid constraints over summer, we have the right tools and processes in place to manage any issues should they occur.

5. A significant programme of routine summer maintenance and investment is planned, to ensure that the network is ready for the winter ahead and beyond.

Summer (1 April – 30 September) demand (bcm)



Summer (1 April – 30 September) supply (bcm)



Demand and supply this summer

Demand

Key message

Total forecast demand for summer 2026 is comparable to the actual (weather-corrected) demand of summer 2025.

The actual demand level is inherently uncertain due to the significant influence changing factors such as the weather, cost of energy and geopolitical developments can have on energy requirements.

Below we highlight the key factors that have influenced our weather-corrected forecast for this summer:

- **Non-daily metered (NDM) –** We expect to see a marginal increase (2%) when compared the previous summer. The announced price cap for April 2026 is lower than last year and this could lead to higher demands. Prices are expected to rise from July as a consequence of the conflict in the Middle East, and this could limit the increases.
- **Daily metered (DM) and industrial demand –** Our forecast is comparable to the previous summer. The history for this category shows a consistent level of demand.
- **Gas demand for electricity generation –** Our forecast has decreased slightly, this is largely due to an increase in renewable generation.
- **Ireland –** Exports to Ireland are forecast to be comparable to the previous summer. Gas Networks Ireland's (GNI's) forecast for the summer can be found here.
- **Exports to continental Europe –** Our forecast is consistent with the previous summer. Whilst the EU is expected to enter the summer with storage stocks towards the lower end of the five-year average, we anticipate that the additional refill will be met by LNG imports into continental Europe. Read more about this in our European storage and exports from Great Britain.
- **Storage Injection –** Our forecast is based on the five-year average. Much of GB storage is highly sensitive to short term price signals. We expect GB storage to behave as usual, with many sites both injecting and withdrawing over the summer.

While weather-corrected demand is comparable to the previous summer, when compared to the actual demand for summer 2025 we are forecasting an increase of around 2.3 bcm. This increase is due to the temperature sensitive demand, mostly NDM, being suppressed in summer 2025 due to warmer weather. The actual demands can be found in the data workbook that accompanies this publication.

Table 1*

Weather-corrected forecast demand (bcm) for summer 2026, and historical demand (2021–2025)

bcm	2021	2022	2023	2024	2025	2026 forecast
Non-daily metered demand (NDM)	11.6	10.4	9.8	10.1	9.9	10.1
Daily metered (DM) and Industrial demand	4.0	3.6	3.7	3.7	3.4	3.4
Electricity generation	10.1	11.5	7.8	5.1	5.4	5.1
GB gas demand	25.7	25.5	21.4	18.9	18.7	18.6
Exports to Ireland	2.4	2.6	2.3	2.4	2.5	2.6
Exports to continental Europe	0.7	12.2	7.1	5.6	6.6	6.6
Storage Injection	2.1	2.2	2.3	2.7	1.8	1.8
Total gas demand	31.0	42.8	33.3	29.7	29.8	29.8

* Total gas demand will not tally with the individual demand components due to NTS shrinkage and rounding.

Supply

Key message

During the summer, Great Britain's demand will be met primarily by gas from the UKCS and Norway, with the balance largely being secured from LNG.

UKCS production will continue to decline as legacy fields mature – this is reflected in the slightly lower forecast (-6%) for summer 2026.

We expect Norwegian supplies to be higher than the previous summer given that Norwegian production is expected to increase by around 3% this year.

Maintenance outages for UKCS (figure 1) and Norway (figure 2) that affect flows to Great Britain are expected to be lower for the coming summer.

LNG supplies are forecast to increase this summer in response to the higher actual demands forecast. Great Britain can receive LNG from a wide variety of sources, we would expect the majority of this to be from the US. Read more about LNG in our Spotlight.

During the summer Britain typically exports to continental Europe and therefore we don't expect imports. This has been the case for many years.

Table 2*

Summer gas supply volumes (bcm) by source – historical (2021-2025), and forecast (2026)

bcm	2021	2022	2023	2024	2025	2026 forecast
UKCS	13.0	18.8	16.3	14.1	13.9	13.1
Norway	11.9	11.5	7.4	11.8	9.8	12.2
Continental European imports	0.1	0.0	0.0	0.0	0.0	0.0
LNG	5.1	9.8	6.4	1.6	1.6	2.7
GB storage withdrawal	1.3	1.6	1.6	1.6	2.0	1.5
Total	31.5	41.7	31.8	29.1	27.4	29.5

* The supply figures are lower than demand, for both the forecast and historics. This is due to supplies connected directly to the distribution networks which is not included in our figures, which only show supplies to the NTS.

If demands are higher than forecast and additional supply is required, this is most likely to come from Norway and LNG.

During the summer, GB storage responds to short-term price signals, leading to both injections and withdrawals. We expect withdrawals (1.5 bcm) to be slightly lower than injections (1.8 bcm), resulting in a net refill of around 300 mcm. However, because GB storage is highly flexible, this balance can shift depending on activity at the end of the previous winter or the start of the next.

The overall storage stocks at the start of this summer are at a similar level to summer 2025.

Figure 1

GB Terminal outages

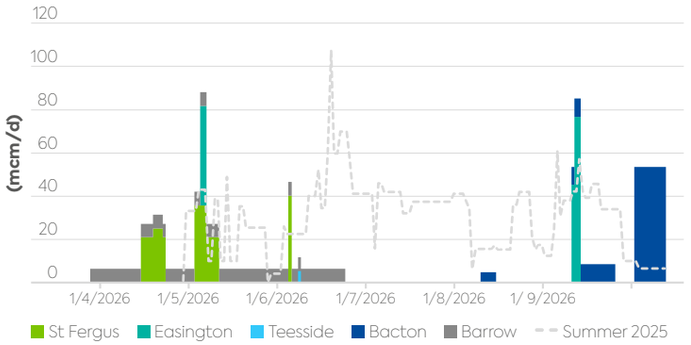
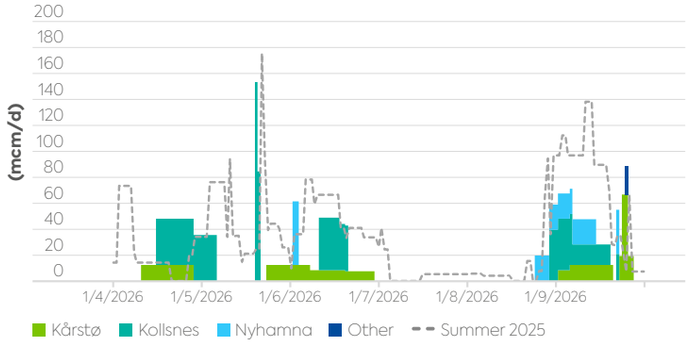


Figure 2

Aggregated GASSCO outages



Middle East conflict: Potential impacts to demand and supply

Our forecast was prepared ahead of the escalation of the conflict in the Middle East. In recognition of the importance of global markets to Britain's energy mix, we have since reviewed our forecasts. There remains uncertainty in many areas, and so to provide additional insight we have looked to cover some of the potential impacts;

Non-daily metered (NDM) – Higher wholesale gas prices in response to the Middle East conflict are expected which may impact demand. However, as about two thirds of NDM demand is in the first half of the summer, and Ofgem's currently announced price cap runs April - June, we expect a limited impact to the overall NDM demand.

Daily metered (DM) & Industrial – Higher wholesale gas prices could impact the level of demand, but for the summer we would expect this to be limited. These customers will have a range of contracts in place with their energy suppliers which could help limit the impact of price rises in the short-term.

Gas demand for electricity generation – The demand level could be impacted by changes in overall power consumption but demand for gas for electricity generation is mostly driven by the availability of other generating technologies. The biggest factor for this will be the availability of renewable generation output, along with nuclear availability which we would not expect to be impacted by the Middle East conflict.

Ireland – Exports to Ireland are impacted by all of the same drivers as already mentioned. But given the overall demand is smaller, we would not expect significant change.

GB storage (injection and withdrawal) – It is possible that more volatile prices could result in increased cycling of GB storage over the summer. This could increase both injections and withdrawals but we would expect the net position to remain the same.

Exports to Continental Europe and LNG imports – Increased competition for LNG could reduce the amount delivered to Great Britain over summer, if this is the case we would expect exports to EU to reduce to balance this. Conversely it is also possible for changes to EU storage refill profiles to lead to higher LNG imports to Great Britain, at times, with exports to EU increased.

UK Continental Shelf (UKCS) and Norway – Higher prices could result in some maintenance being delayed and therefore result in slightly higher production levels. If this does occur it would likely result in lower imports of LNG.

Spotlight on markets

Gas demand for electricity generation

European storage and exports from Great Britain

Liquefied natural gas

Gas demand for electricity generation

Spotlight

Key message

Gas-fired generation will continue to play a critical role in the electricity market, with increasingly frequent large swings in output required to balance supply and demand.

Although both the total summer demand and daily peak demand for gas for electricity generation are lower in summer than in winter, it still has a significant impact on the NTS. Gas-fired power stations continue to play a crucial role in meeting electricity demand, providing essential flexibility to the system. Power station output increases when renewable generation is low and decreases when renewable generation is high, helping to balance the electricity market throughout the year.

To provide this flexibility gas-fired power stations can rapidly turn up to respond to changes in renewable generation. Summer 2025 saw a significant increase in the volatility of gas-fired generation with more instances of large increases in generation over a short period.

This is illustrated in figure 3 which shows the number of half hours which saw an increase of more than 4 GW over the previous six hours. This shows that in summer 2025 there were 15 instances of increases over 6 GW, with a max of 6.4 GW. In addition, there was an increase in half hourly swings within the 5-6 GW range.

As an example, figure 4 shows how the generation mix changed on 29 April 2025, which was the day with the highest swing in gas generation of 6.4 GW from 13:00 to 18:30.

At the start of the day, gas generation remained relatively stable at around 6 GW. As solar output increased through the morning, gas-fired generation declined, reaching a mid-day low of approximately 3 GW. Wind generation remained subdued for most of the day, with only a modest uptick in the early evening.

Later in the afternoon and into the early evening, gas generation rose sharply to a maximum of 6.4 GW, as diminishing daylight reduced solar output and electricity demand increased – particularly due to lighting needs. This interaction between gas, solar, and wind highlights the crucial role of gas-fired power as a flexible balancing resource within the energy mix.

Figure 3
Count of half hours with at least 4 GW increase in gas-fired generation over the previous 6 hours

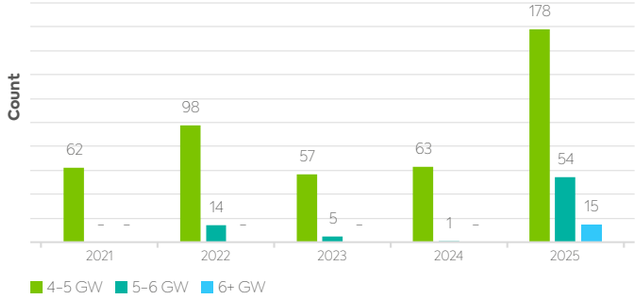
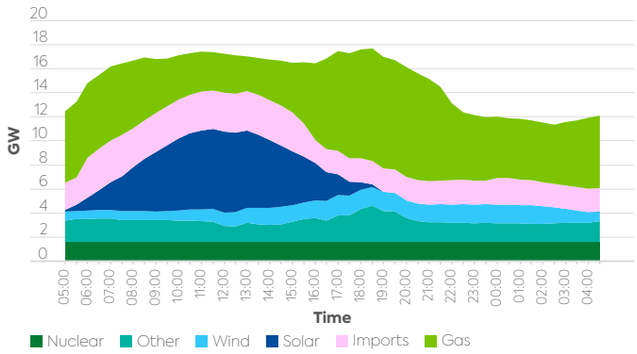


Figure 4
Generation mix 29 April 2025



European storage and exports from GB

Spotlight

Key messages

1. **EU is expected to enter the summer with storage stocks towards the lower end of the five-year range.**
2. **This could result in increased demand for injections into storage although flexibility over stock targets could limit the level of refill.**
3. **Exports from Great Britain to continental Europe are expected to remain at a similar level to last year as any increase in storage injections would likely be met by an increase in LNG imports into EU.**

During the summer supplies to Great Britain often exceed domestic demand and GB storage requirements, this additional gas is exported to continental Europe via the two interconnectors. The seasonal refilling of European storage refill is an important factor which influences the level of exports from Great Britain. In this section we focus on the expected refill to EU storage and how this impacts exports from GB.

EU storage started winter 2025-2026 with lower levels than the previous year. With similar withdrawal rates during winters 2024-2025 and 2025-2026, storage ended winter toward the lower end of the five-year range. This means higher summer refill demand is likely.

To ease the challenging refill conditions the EU introduced a 10% storage-target flexibility in 2025, with an additional 5% available if needed. As a result, summer refill needs could range from about 48 bcm (to reach 75% full) to around 63 bcm (to reach 90%).

The final level of refill required will strongly influence LNG demand for EU. To understand this we have assessed a case of 56 bcm refill over the summer, enough to return stocks to the levels seen at the start of winter 2025-2026. This is around 6 bcm more than last summer.

There remains significantly more capacity to land additional LNG deliveries in EU than has been utilised in previous summers. This should be sufficient to meet any additional demand. To illustrate this, in figure 6 we have shown historic LNG imports against both the maximum regasification capacity and limited to 70%, the level of utilisation seen in 2022.

With the modest additional refill to EU storage expected to be met by increased LNG deliveries to continental Europe exports from Great Britain are expected to remain at a similar level to last year.

Figure 5
Continental European gas storage levels (bcm) vs the 5-year average (2021-2025) (Source: GIE)

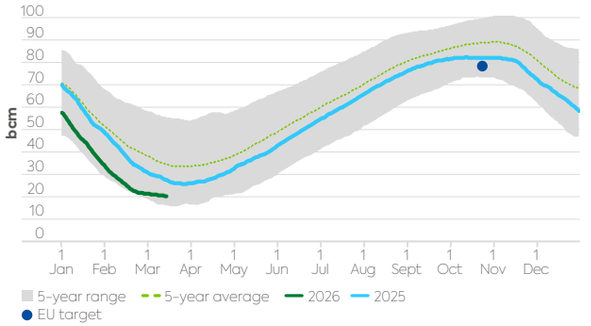
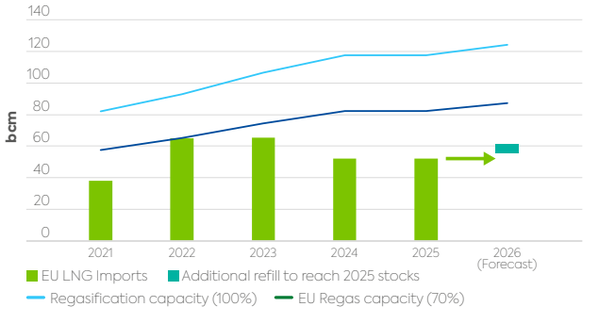


Figure 6
Yearly LNG deliveries against approximate EU27 summer regasification capacity (Source: IEEFA, GIE)



Liquefied natural gas

Spotlight

Key messages

1 LNG imports to Great Britain are expected to increase by about 1.1 bcm (65%) to meet the increase in forecast demands compared to last year's actuals.

2 Whilst the percentage increase for LNG is large the overall supply remains significantly below both Norway and UKCS for the summer, accounting for only 9% of total supply.

LNG provides key flexibility to Great Britain's market during summer. Over the past five summers imports have varied significantly from 9.8 bcm (24% of supply) in 2022 down to 1.6 bcm (5% of supply) in 2024.

The Middle East conflict has disrupted global LNG supply, with attacks on energy infrastructure, such as the damage sustained to the Qatari Ras Laffan LNG complex leading to a complete shutdown of LNG production in the region. Given the damage to the facility the timeline for any resumption remains uncertain, with a full return to pre conflict production levels unlikely during 2026. At the same time, LNG tanker traffic through the Strait of Hormuz has been effectively halted, removing a major flow of global supply and therefore tightening markets. As shown in figure 7 Qatar accounts for around 20% of global LNG exports, with this physical disruption sending global gas prices higher.

The direct impact to Great Britain's supply is limited as we don't receive significant volumes from Qatar during the summer. Last summer these totalled under 0.5 bcm (2%) of total demand. However, the interconnected nature of global gas markets mean, the disruption to LNG supply is expected to increase competition for spot cargoes, driving gas prices higher. The duration of these higher prices will depend on how long it takes Qatari production to recover and shipping to resume through the Strait of Hormuz.

Over half our LNG supply is currently from the US and with liquefaction capacity expected to increase over the summer we would expect the US to remain the dominant source of LNG for Great Britain. Alongside the US, Britain receives LNG from a wide variety of sources. Over the last two years we have imported LNG from Algeria, Angola, Brazil, Egypt, Equatorial Guinea, Mexico, Nigeria, Norway, Peru, Qatar and Trinidad and Tobago.

LNG imports are expected to increase this summer, when compared to the previous summer, by about 1.1 bcm (65 %) to a total of 2.7 bcm. This is driven by increased demands – mostly in the NDM sector. Given their flexibility, LNG imports could change if warmer weather reduces demand. Additionally, should LNG deliveries be landed in the UK instead of continental Europe, either for commercial or technical reasons, this could increase both LNG imports and exports to continental Europe.

Figure 7
Global LNG Exports 2025 (Source: LNG Journal)

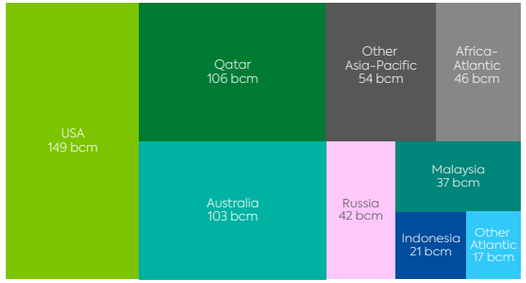
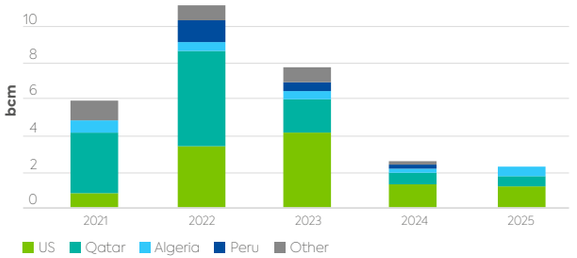


Figure 8
GB summer LNG deliveries by origin (Source: LNG Journal)



Operational outlook

Operational outlook

Key messages

1. **We are undertaking a significant level of routine maintenance and investment this summer, including the isolation of 460 miles of pipeline and outages across all our compressor stations.**

2. **We continue to work closely with our customers to minimise the risk of curtailing their ability to deliver and offtake gas during our maintenance. Our maintenance activities that could impact customers are 97% aligned with their planned outages, which significantly limits any customer impact.**

Demand is traditionally lower during the summer as the need for heating reduces. For most of our assets the summer therefore represents the best period for maintenance. The annual maintenance cycle prepares our asset base for high demand periods and safeguards the operational flexibility required to meet with our customers' diverse supply and demand patterns during the gas day and throughout the year.

We are carefully scheduling our maintenance works to ensure they have the least possible effect on network resilience and operational flexibility. This will allow us to bring compression online at short notice to both maintain locational pressures and to respond to the changes in supply that usually occur over the summer period.

2026 is the start of RIIO-GT3, therefore a substantial amount of planning is being carried out to ensure that our outage plan is aligned with this new price control period. There is a marked increase in the volume of capital works supporting the adaptation of the NTS to the new flow patterns instigated by LNG and decarbonisation. We are also delivering essential system upgrades to ensure continued protection as cyber risks evolve. The increasing volume and complexity of works mean that our Summer 2026 Outage Plan is more congested and spans a longer period than usual. Further details of our maintenance plans can be found on our website.

Asset maintenance

Asset maintenance remains a key aspect of our asset management strategy aimed at ensuring that we maintain a safe, reliable and resilient network.

A significant proportion of the assets are reaching, or have reached, the end of their design life. The extensive use and age of our critical infrastructure means our assets now require greater care, increased monitoring, refurbishment and replacement to maintain a safe, reliable transmission system.

Our asset maintenance strategy considers the likely failure modes of each asset type and the consequences of losing an asset. This strategic analysis leads to decisions on the type of intervention needed.

As we embark upon RIIO-GT3, we continue to invest significantly in the maintenance of our assets and that has influenced the scale of our asset maintenance programme.

Our key maintenance works this summer involve:

- In-line inspection (ILI) runs; ILI digs; risk-based inspections driven by considering pipeline condition, criticality, safety and performance of corrosion prevention.
- Compressor station works which involve condition monitoring, functional checks, scheduled inspections, usage-based inspections and control system upgrades.
- Extensive programme of asset surveys and inspections in preparation for investment works in RIIO-GT3.

Our asset management maturity is underpinned by our routine maintenance activities, which proactively identify asset health issues. The information we collect enables us to manage our Network Development Process by prioritising investment decisions.

Contact us

Industry engagement

Industry engagement

We look forward to continuing the conversation with you at our upcoming engagement forums. The dates for our next National Gas Energy Forums are available below.

The forum agenda varies from month to month depending on requests, operational events, and where we are in the gas year. We will continue with themed forums, which will be hybrid events held online and in London, as well as our online only events and covering key standing items.

Upcoming 2026 National Gas Energy Forums (NGEF):

- **16 April:** London and Online
- **18 June:** London and Online
- **16 July:** Online only*

*Our online only meetings will be a mixture of different topics, including sharing of operational information, updates on key projects or regulation changes and feedback sessions, depending on what is happening at the time of the event. You can find details about the forums, and how to sign up to attend them on our website.

Your feedback is so important to us

Letting us know what you think of the information we share with you, and how we're sharing it, helps us shape our future communications to ensure we're communicating what matters most, in a way that suits you. Send us an email to share your views and feedback on our publications.

For any press enquiries please get in touch with our Corporate Affairs team here.

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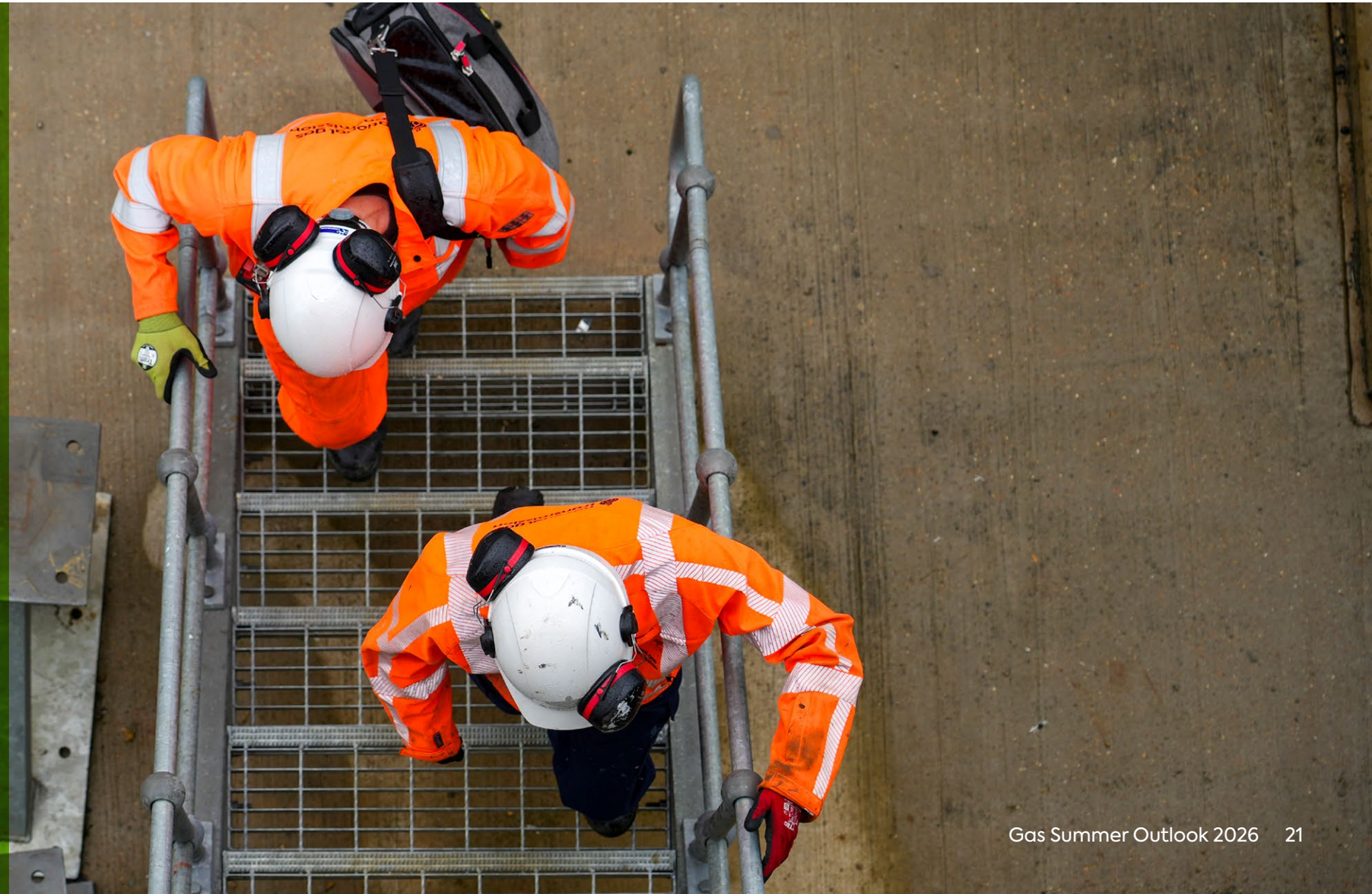
Appendix

Data tables in TWh

Our role and responsibilities



Data tables in TWh

Table A
Weather-corrected historic demand and 2026 forecast

TWh	2021	2022	2023	2024	2025	2026 forecast
Non-daily metered demand (NDM)	127.6	114.5	108.0	111.5	108.5	111.1
Daily metered (DM) and Industrial demand	44.0	39.6	41.2	41.0	37.5	37.5
Electricity generation	111.1	126.3	85.8	55.7	59.8	56.1
GB gas demand	282.7	280.4	235.0	208.2	205.8	204.7
Export to Ireland	26.4	28.9	25.8	26.8	27.2	28.7
Export to continental Europe	7.7	133.8	78.4	61.1	72.4	72.4
GB storage injection	23.0	24.1	25.1	29.6	20.3	20.1
Total gas demand	339.8	467.3	364.3	325.7	325.8	328.3

Table B
Historic supply and 2026 forecast

TWh	2021	2022	2023	2024	2025	2026 forecast
UKCS	143.4	206.8	179.2	154.7	153.4	144.1
Norway	130.6	127.0	81.5	130.1	108.3	134.2
Continental European imports	1.6	0.0	0.0	0.1	0.0	0.0
LNG	56.2	107.8	70.6	17.5	18.0	29.7
GB storage withdrawal	14.5	17.2	18.0	17.2	21.7	16.5
Total	346.4	458.9	349.4	319.6	301.4	324.5

A good guide for converting to energy in watt hours from gas volume in cubic metres is to multiply by 11.

So, for example, 4 mcm approximates to 44 GWh, and 80 bcm approximates to 880 TWh.

Note: 1 TWh = 1,000 GWh, and 1 bcm = 1,000 million mcm.

Our role and responsibilities

National Gas owns and operates the National Transmission System (NTS) in Great Britain. Our licence obligates us to develop, maintain and operate an economic and efficient network as established under the Gas Act 1986.

These obligations include facilitating competition in the supply of gas, maintaining system balance on the day, operating safely within pressure and gas quality limits, and planning and developing the network to meet peak demand against the established 1-in-20 demand standard. The only formal security standard applied to supply of gas in Great Britain is the N-1 standard, as defined in Article 5 of the retained EU regulation 2017/1938.

This N-1 standard, which is applied to the Secretary of State for Energy Security and Net Zero, is an infrastructure-based test that assesses whether the GB system has sufficient aggregate gas supply capability upstream of the NTS, to meet demand in the event of the failure of the single largest supply source.

Importantly, N-1 relates to up stream supply capability. This includes upstream production (UK Continental Shelf), imports (EU and Norway), LNG and storage availability and deliverability. As such, it is a test of physical gas supply capability, rather than an assessment of the realistic maximum volume of actual gas that may be deliverable to the NTS on any given day. The overall availability of gas is expected to be ensured through market arrangements and commercial incentives, rather than through obligations on the System Operator. This separation between upstream infrastructure capability and the actual gas supply availability is well-established within the current regulatory and policy framework.

On the day, National Gas fulfils its role as residual energy balancer of the NTS through trading on the on-the-day commodity market, both title and physical gas, buying or selling gas as necessary to physically balance the system, and maintain system integrity within established ranges of pressure and volume across the network. This operational role requires visibility of supply conditions to manage any emerging system stress events and escalate risks, where appropriate.

However, it does not place any accountability on National Gas for securing the availability or delivery of any upstream gas supply capability. National Gas does not control upstream production, import capacity, storage levels or wider commercial supply decisions. Gas Shippers, as customers of National Gas on the NTS, are incentivised under the gas balancing regime and associated commercial framework agreements to balance their portfolios on any gas day. These incentives create the commercial environment within which shippers secure sufficient upstream gas supplies to meet their customers' daily demand.

While National Gas does procure some physical gas supply through Operating Margins (OM) ahead of the day, this is only an operational tool, held in reserve, and available for release at short notice to support system integrity under defined stress scenarios. As opposed to a mechanism for securing a level of supply availability to balance the networks. Accountability for ensuring sufficient upstream supply capability therefore sits outside National Gas's current Gas Transporter Licence and Uniform Network Code obligations.

Similarly, National Gas does not have an obligation to proactively reinforce the transmission network in order to secure upstream supply availability. Investment in transmission network infrastructure is typically undertaken where justified by an economic assessment of identifiable operability, or constraint risk, or where driven by a specific customer request. Such reinforcements, where approved by Ofgem, are therefore either the outcome of a cost benefit analysis linked to defined network risk, or are customer led and subject to a Net Present Value (NPV) assessment and a long-term capacity commitment. Rather than mechanisms intended to ensure national level of gas supply adequacy.

Accordingly, although National Gas plays a critical role in identifying, managing and communicating risks to the operation of the gas system and is responding to this consultation on that basis, it does not hold accountability for securing the supply of gas to the GB market or securing sufficient upstream supply capability.

Glossary

Glossary

Asset
Any physical part of the network and includes such things as compressors, pipelines, flow valves and regulators.

Bcm
Billions of cubic metres. Unit or measurement of volume, used in the gas industry. 1 bcm = 1,000,000 cubic metres.

Compressor
Compressors are used to move gas around the transmission network through high pressure pipelines. These compressors move the gas from entry points to exit points on the gas network. They are predominantly gas driven turbines that are in the process of being replaced with electric units.

Continental European Interconnectors
Two pipelines connecting Great Britain and the EU. The Interconnector (UK) Limited is a bi-directional gas pipeline connecting Bacton in the UK and Zeebrugge in Belgium. BBL is a bi-directional gas pipeline connecting Bacton in the UK and Balgzand in the Netherlands.

Daily metered (DM) demand
A classification of customers where gas meters are read daily. These are typically large-scale consumers.

Electricity (power) generation
Electricity generated by the burning of gas.

Export
Gas demand on the NTS via interconnectors to continental Europe or the island of Ireland.

Gas Supply Emergency (GSE)
A gas supply emergency (GSE) occurs when we are unable to maintain a supply – demand balance on the NTS using our normal system balancing tools. As a consequence of the imbalance between supply and demand, pressures in the system fall and it may not be possible to safely maintain gas supplies to industrial and domestic gas consumers who are supplied with gas either directly or indirectly from the NTS. A gas supply emergency (GSE) may be caused by unforeseen circumstances, such as pipeline or equipment failure, or where system demand exceeds either total supply or planned system capacity.

GB demand
Demand excluding interconnectors, storage injection and exports to Ireland.

In-line inspection (ILI)
In-line inspection (ILI) involves the evaluation of pipes and pipelines using "smart pigs" (both tethered and non-tethered) that utilise non-destructive examination techniques to detect and size internal damage. ILI measures and records irregularities in pipelines including corrosion, cracks, deformations, or other defects.

LNG
Liquid natural gas that has been converted to liquid form for ease of storage or transport. It is formed by chilling gas to -161°C so that it occupies 600 times less space than in its gaseous form.

National Transmission System (NTS)
A high pressure gas transportation system consisting of compressor stations, pipelines, multi-junction sites and offtakes. Pipelines transport gas from terminals to offtakes. The system is designed to operate at pressures up to 94 barg.

Glossary

Non-daily metered (NDM) demand
A classification of customers where gas meters are read monthly or at longer intervals. These are typically residential, commercial or smaller industrial consumers.

Norway/Norwegian Continental Shelf (NCS) Gas supplied to the NTS via pipelines from Norway.

NTS shrinkage
NTS shrinkage is made up of 3 components. Unaccounted for gas (UAG) is unallocated gas or gas that is lost or stolen from the system. Own use gas (OUG), gas that is used in the running of the system e.g. compressor fuel. And calorific value shrinkage (CVS) where gas of a particularly low or high CV enters the distribution network which differs with the flow weighted average CV of gas entering that network.

Margin
The difference between gas supply and demand. A positive margin indicates supply is greater than demand. A negative margin when demand is greater than supply.

On the day commodity market (OCM)
The OCM is the market we use in our role as residual balancer. The balancing market is operated by the ICE Endex exchange, as appointed by National Gas.

RIIO-GT3
The RIIO-GT3 period is 2026 to 2031. Ofgem's performance-based RIIO model seeks to ensure consumers get the necessary investment in Britain's energy networks at a fair price. RIIO stands for Revenue=Incentives+Innovation+Outputs. Companies have to meet performance targets, set in consultation with consumers and network users: failure to do so brings automatic penalties.

Storage injection
Gas for storage injection This is gas which is put ('injected') into a gas storage facility.

Total gas demand
All NTS demand, including interconnectors, storage injection and exports to Ireland.

UK Continental Shelf (UKCS)
UKCS is made up of the areas of the sea bed and subsoil beyond the territorial sea over which the UK exercises sovereign rights of exploration and exploitation of natural resources.

Weather-corrected
The demand expected with the impact of weather removed. Actual demand is converted to demand at seasonally normal weather conditions, by multiplying the difference between actual Composite Weather Variable (CWV) and expected CWV by a value that represents demand sensitivity to weather.

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