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forum

Welcome

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Ian Radley

Chief Commercial Officer
National Gas

Agenda

Part I – Industry Leader Updates *10:00*
Lord Moynihan, House of Lords
Jenny Phillips, National Gas
Gavin Williams, National Gas
Break *(11:15 – 11:40)*

Part II *11:40*
William Knight, DESNZ
Phoebe Finn, Statera Energy
Marcus Gurske, World Gas Conference
Lunch (12:30 – 13:00)

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Part I

Part I Speakers

Lord Moynihan

Shadow Minister for Energy Security and Net Zero

HOUSE OF LORDS

Jenny Phillips

Director of Energy Delivery

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Gavin Williams

Energy Security Strategy Manager

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Lord Moynihan

Shadow Minister for Energy Security & Net Zero, House of Lords

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Jenny Phillips

Director of Energy Delivery
National Gas

National Gas Operational Update and Summer Outlook

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Since the Last National Gas Energy Forum:

The Guardian

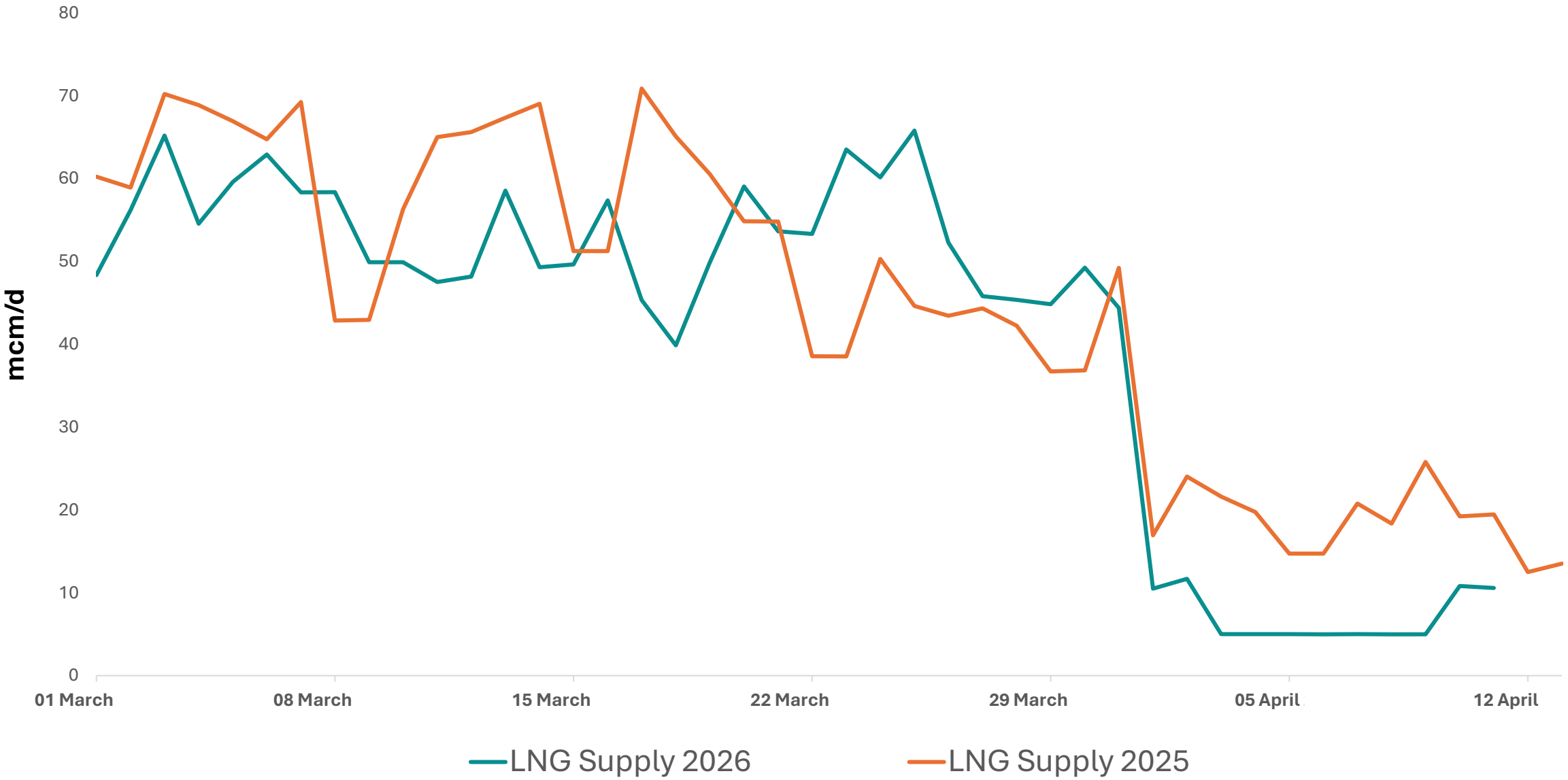
Great Britain has only two days of gas stored, while Iran war threatens to disrupt supplies

National Gas insists storage broadly in line with levels for time of year despite disruption for tankers carrying LNG

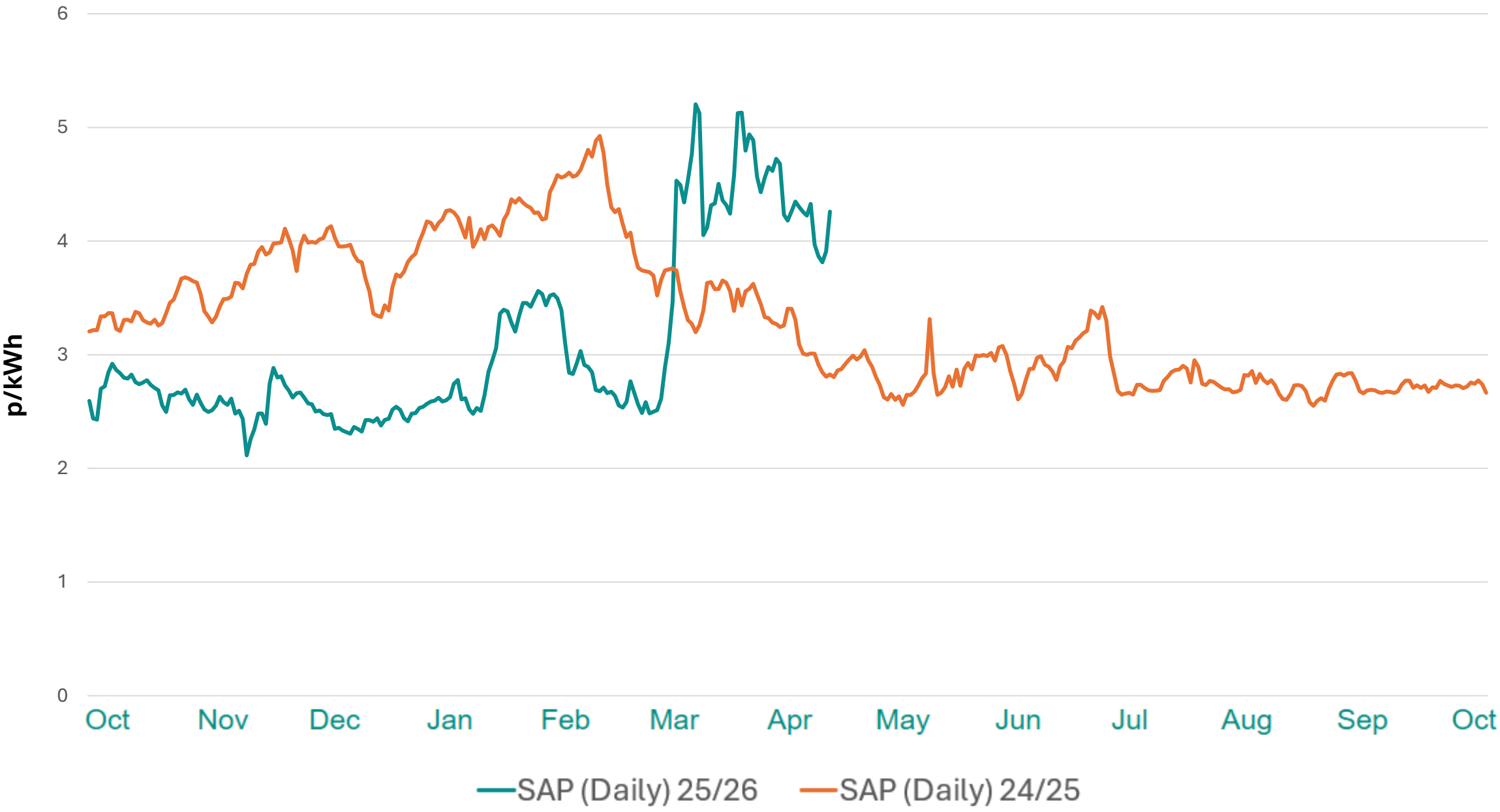
A tanker carrying liquefied natural gas. The Iran war has disrupted shipping. Photograph: AP

UtilityWeek

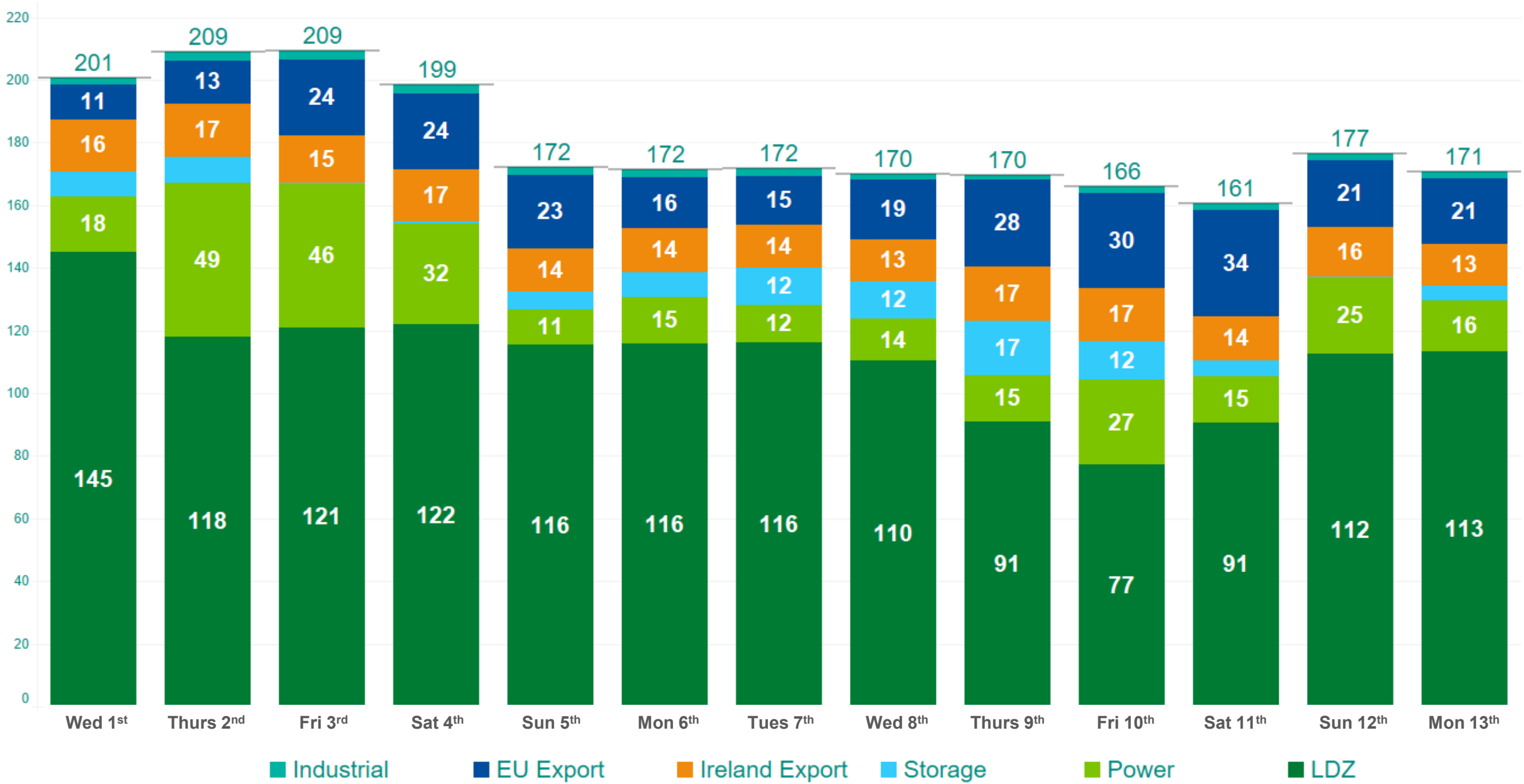
Daily LNG Supplies vs 2025



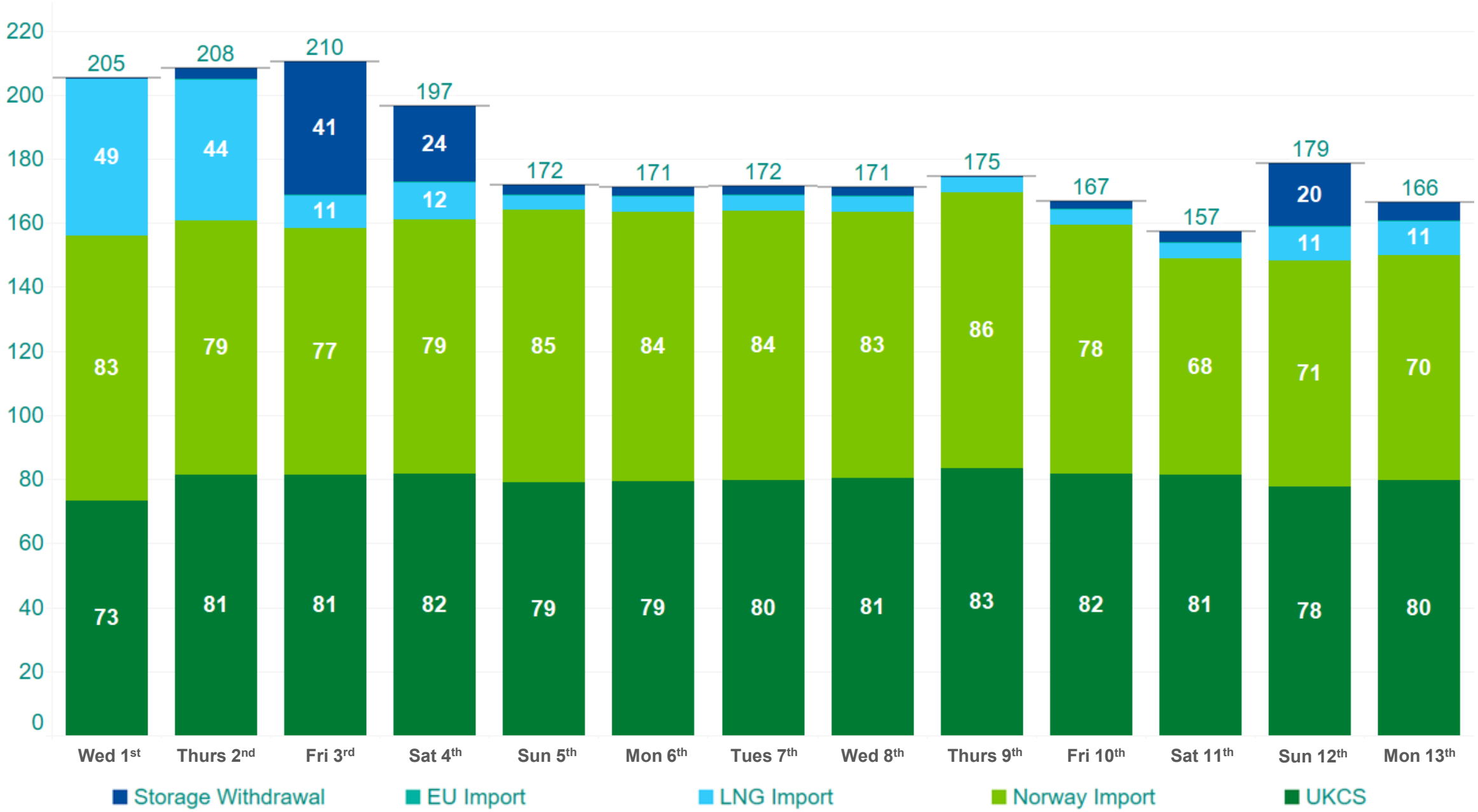
System Average Price vs 2025



NTS Demand Overview April ‘26



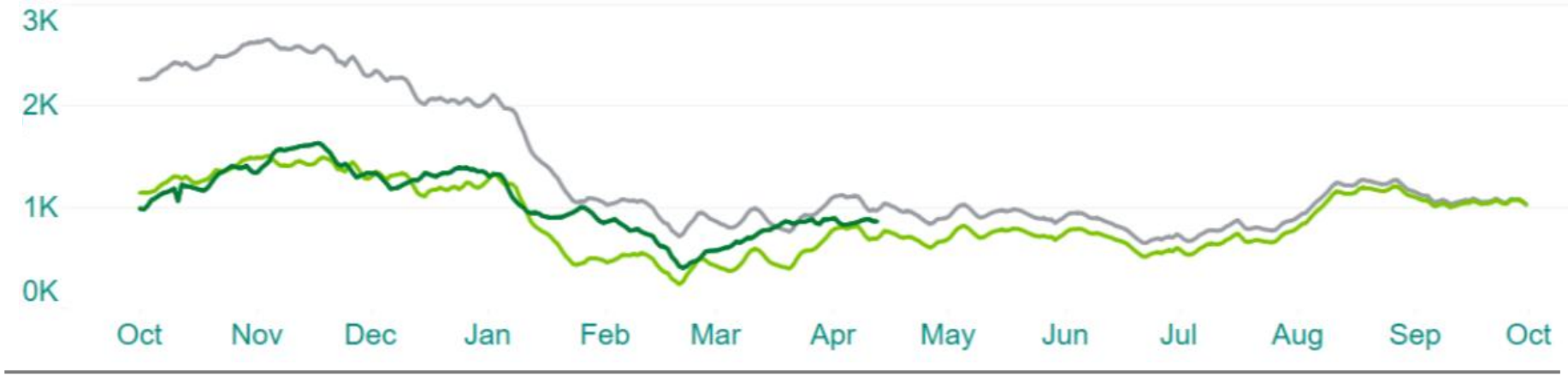
NTS Supply Overview April ‘26



GB Storage Levels

Total GB Storage Stock
896 mcm
46% full (MRS)

- Total Storage Oct-25 – April-26
- Total Storage Oct-24 – Oct-25
- MRS Only Oct-24 – Oct-25



Total LNG Storage Stock
1071 mcm
83% full

- LNG Stock Oct-25 – April-26
- LNG Stock Oct-24 – Oct-25

All data as at 16:00 13/4

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GB Storage

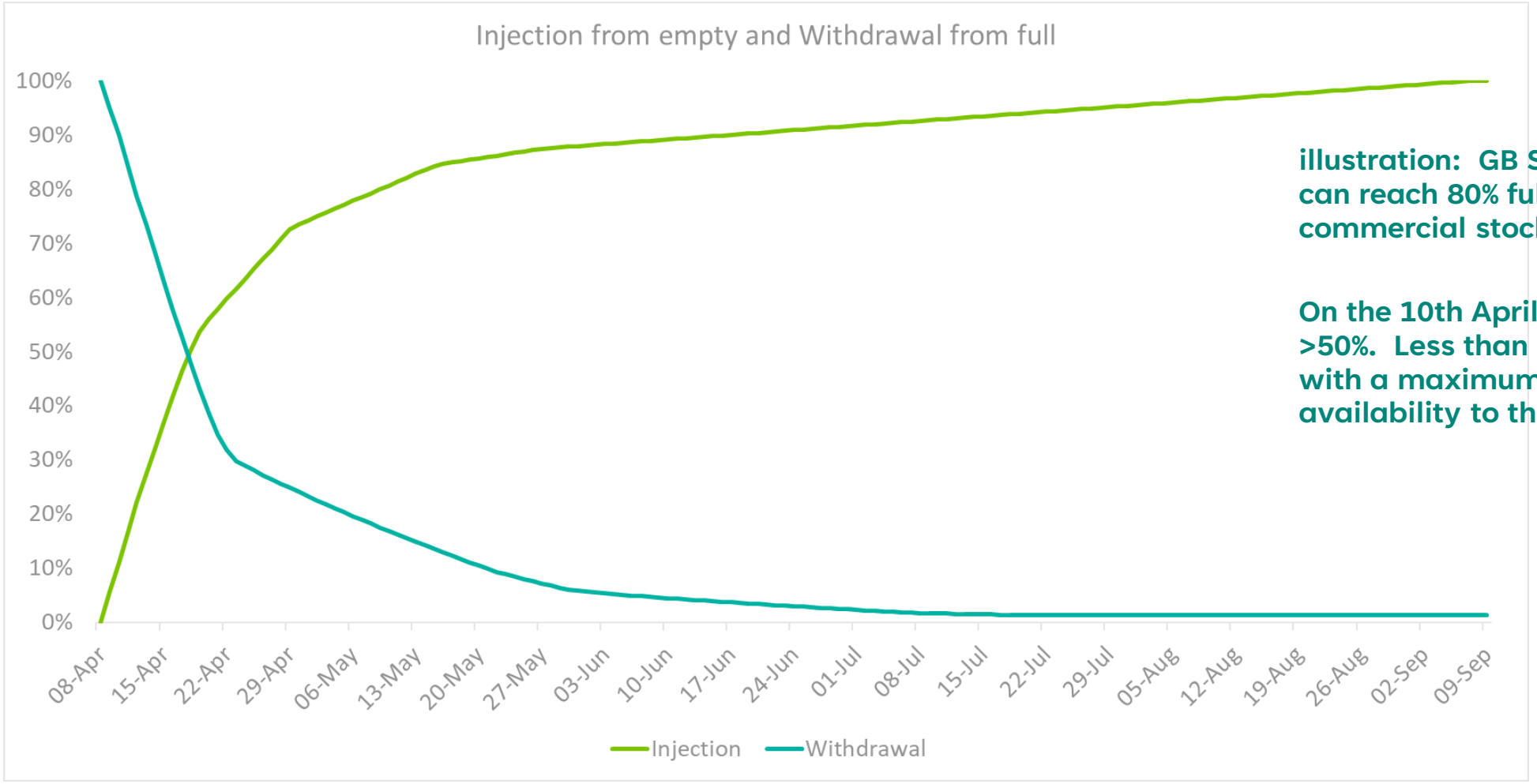
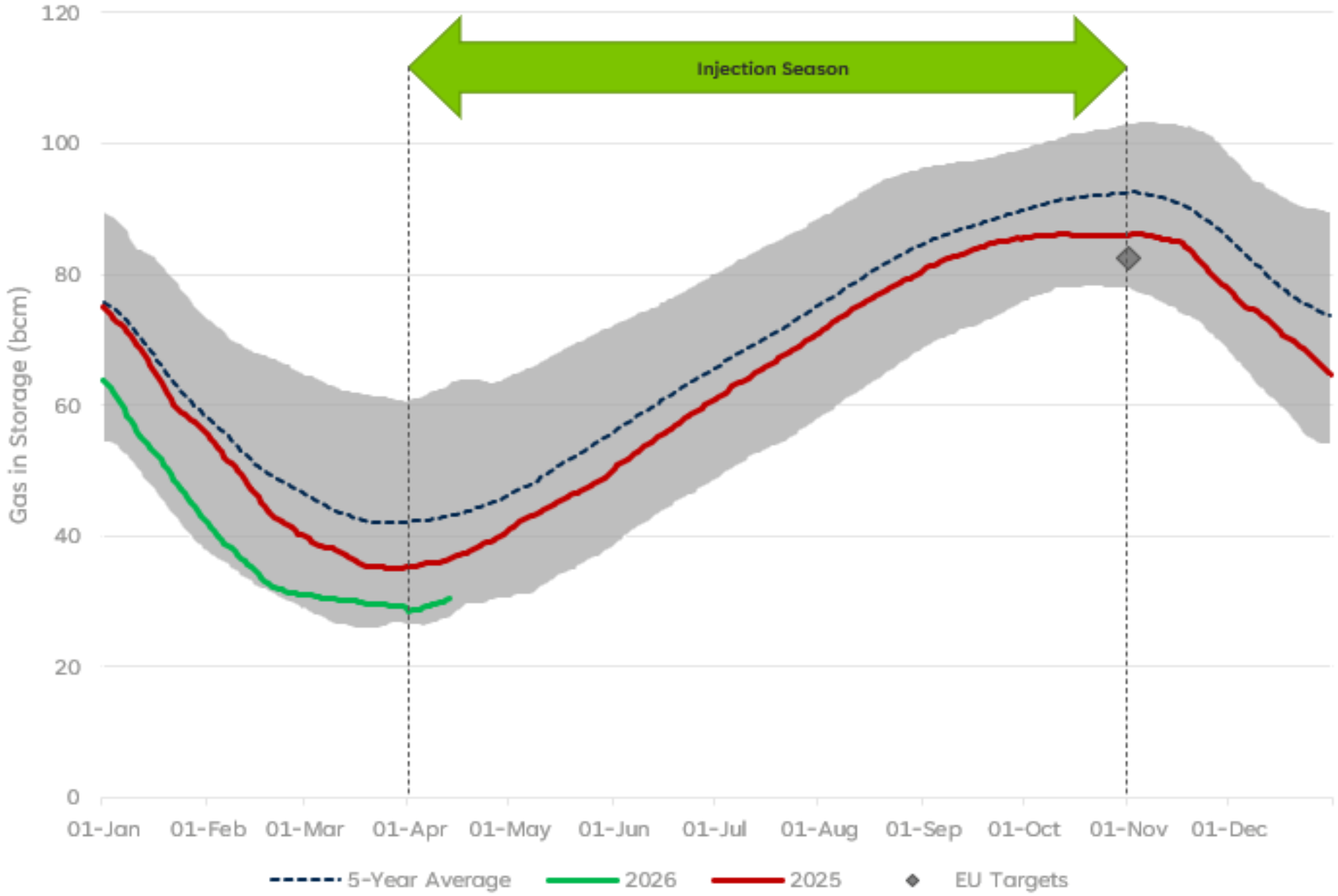


illustration: GB Sites Injecting at full rates can reach 80% full in 31 days from zero commercial stocks

On the 10th April : GB MRS stocks >50%. Less than 20 days to fill at max rates with a maximum daily deliverability availability to the market of > 100mcm/d

*Indicative figures

EU Storage Levels



Renewable electricity generation levels

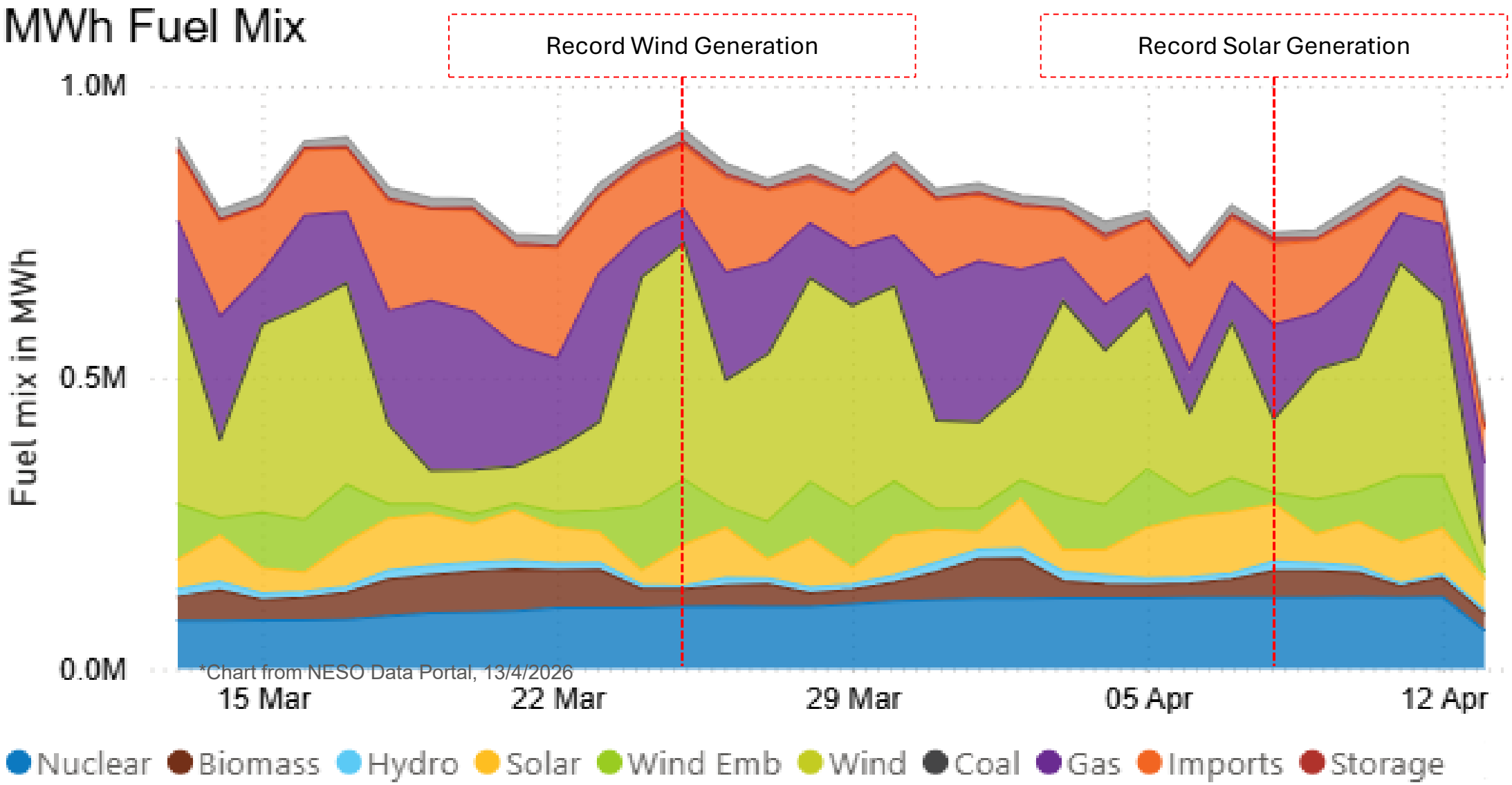


*Chart from NESO Data Portal, 13/4/2026

Renewable electricity generation levels

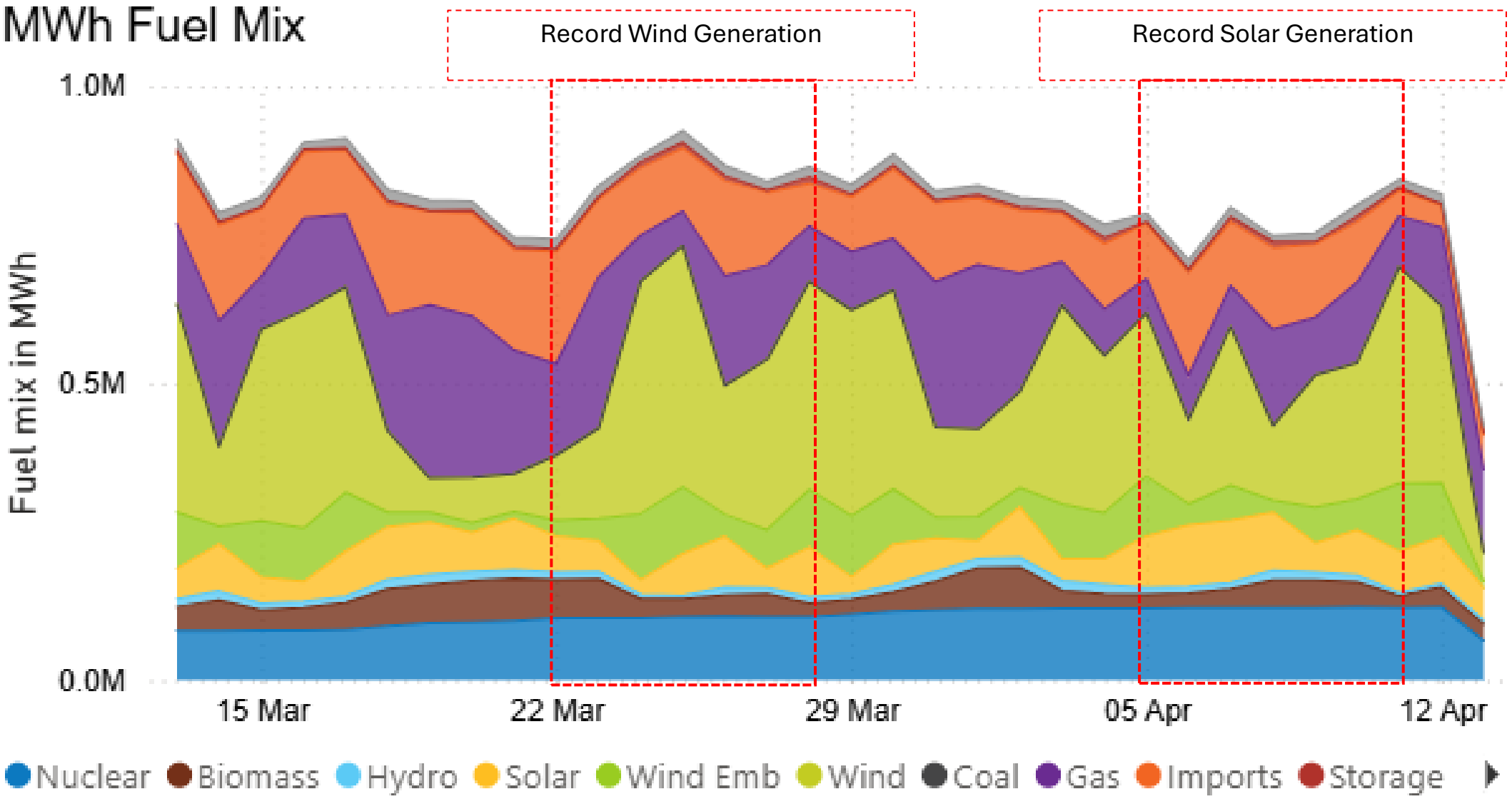


*Chart from NESO Data Portal, 13/4/2026

Maintenance Plan

Compressor Outages **59**

+

Pipeline Isolations **29**

+

In Line Inspections **23**

+

Gas Quality Upgrades **12**

+

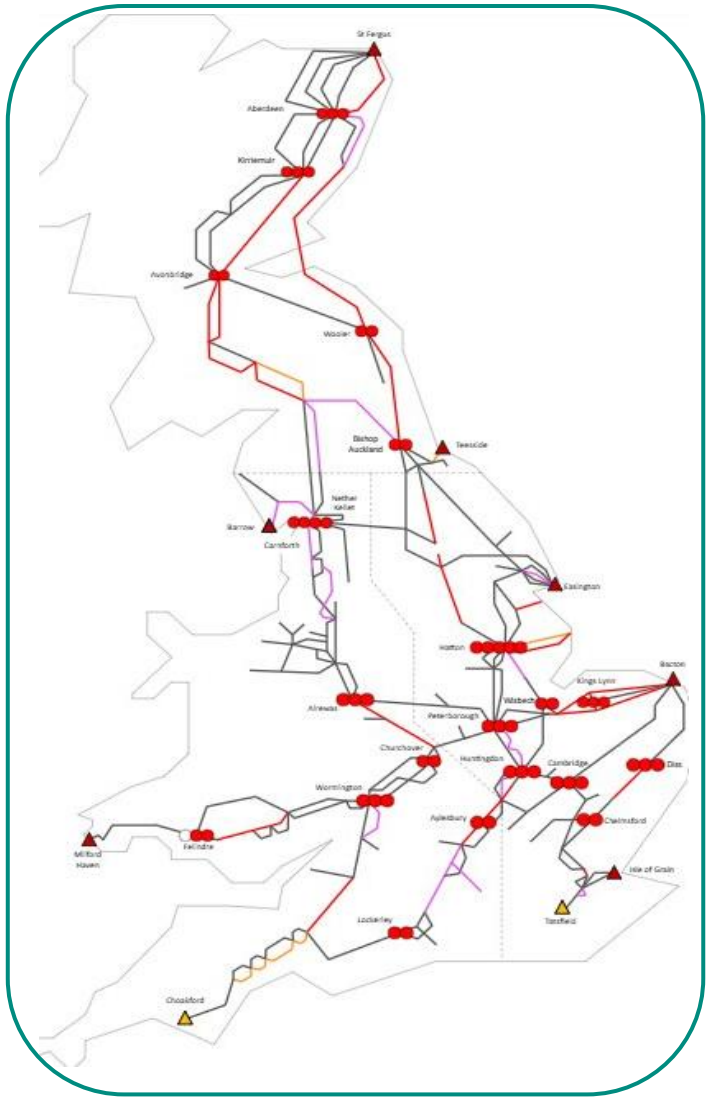
Restrictions, FCV and Telemetry Works **12**

→ **135** Total Outages in FY27

Kilometres of pipeline will be isolated in FY27

760km

That’s the equivalent of one pipeline outage from London to Zurich



Link: 2026 Summer Outage Plan Final

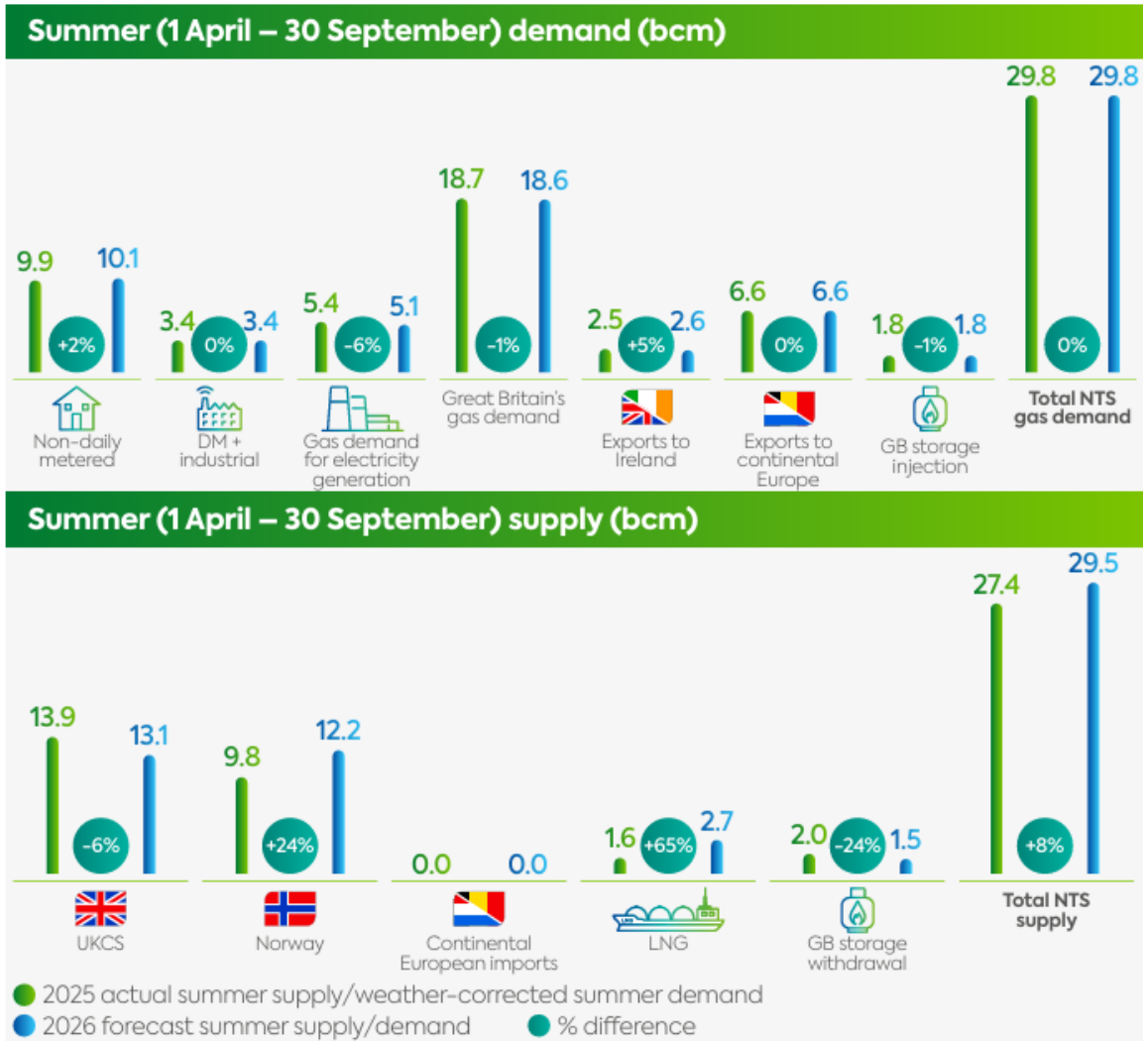
Summer supply & demand forecast

Demand

- 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%).
- 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.

Supply

- Demand is expected to be met primarily by supplies from UK Continental Shelf and Norway, accounting for around 86% of total supply, and exceeding forecast demand for Great Britain and exports to Ireland.
- The remainder is met through a combination of Great Britain's flexible gas storage (around 5%) and LNG imports (around 9%), providing additional system flexibility.



Middle East: potential impacts to supply and demand

Non-daily metered (NDM) – The higher wholesale gas prices are predicted to increase the price cap from July. However, as about two thirds of NDM demand is in the first half of the summer, 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.

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.

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.

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Gavin Williams

Energy Security Strategy Manager
National Gas

National Gas Response to the DESNZ Security of Supply consultation

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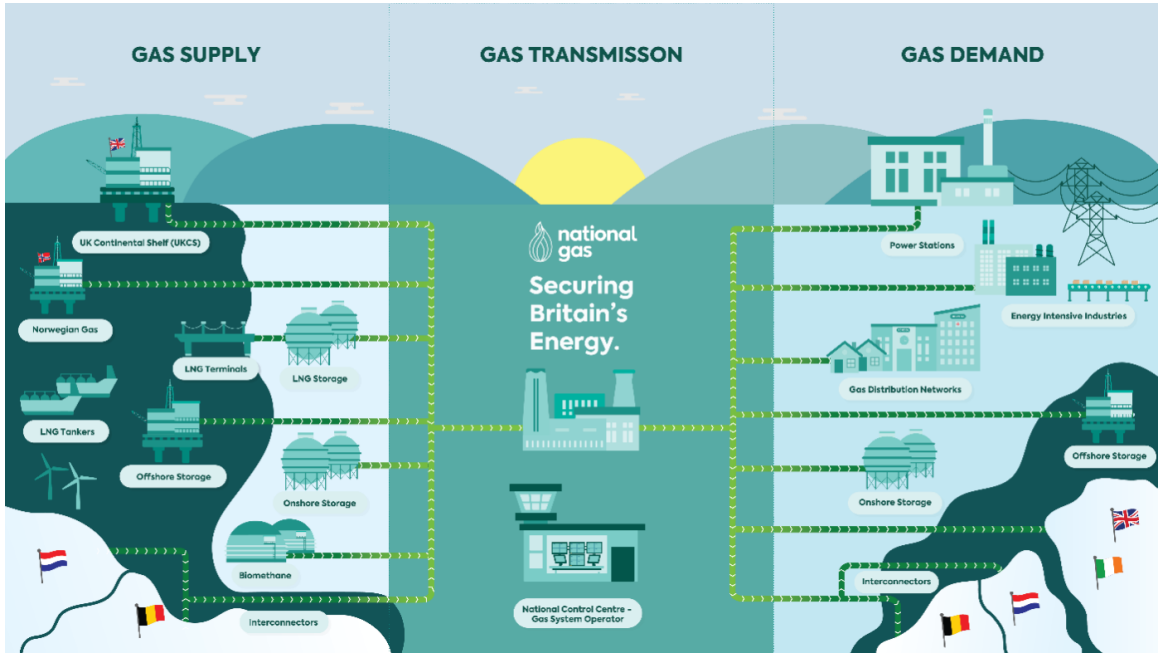
- Our role in securing Britain’s energy
- Background
- Enduring role of gas
- Policy options

Our role in Securing Britain's Energy



We own and operate the National Transmission System (NTS) in Great Britain

We operate under our Gas Transporter licence:

- Maintain system balance on the day as residual balancer of the NTS
- Operate safely within pressure & gas quality limits
- Facilitate competition
- Develop a network to meet peak demand (1-in-20)

National Gas does not control upstream production, import capacity, storage levels or wider commercial supply decisions.

Similarly, National Gas does not have an obligation to proactively reinforce the transmission network in order to secure upstream supply availability

Background

Gas flow 2000

Predominant North to South

Gas flow 2022

Diversity of supply

Gas source: 2000

Gas source: 2022

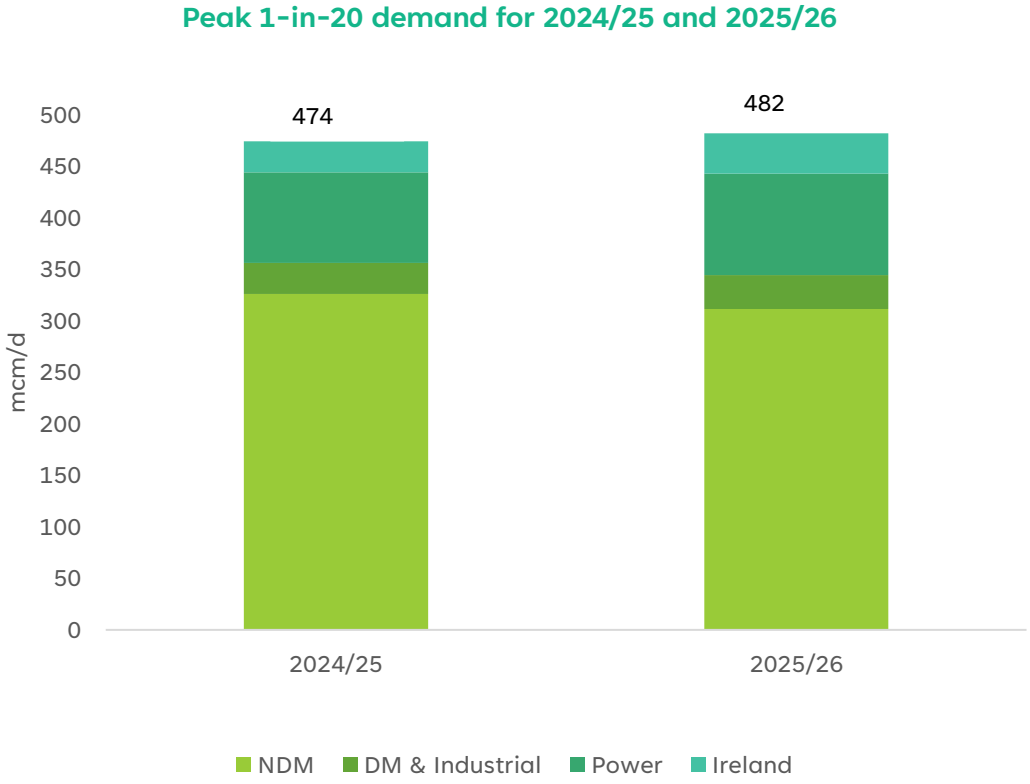
UKCS Green Gas Norway Interconnectors LNG

- Gas flows across the NTS have evolved in response to changing supplies
- UKCS decline and commercial GB import decisions impact supply margins

- Recent assessments show increased GB gas security risks during periods of high demand:
  - National Gas' Winter Outlook and NESO's GSSA identify credible near-term scenarios in which supply shortfalls could arise in certain scenarios including supply losses

Enduring role of gas

- Annualised gas demand is declining
- Peak demand remains high / increasing
- Role of gas evolving to fulfil a crucial “strategic reserve” for power generation
- Gas continues to be the primary energy source for domestic heating
- Inherent variability of renewable generation means system balancing needs greater during times of low renewable output
- This requires an increasing role for a dispatchable energy vector to close the gap



3 key aims

Risk Appetite & Security Standard

- Determine GB risk appetite across credible supply-demand scenarios
- Maintain existing infrastructure/ planning standards
- Introduce ‘deliverable commodity’ security of supply standard

Future proofed & competitive market

- Review of upper Wobbe Index
- Introduce a single National Transmission System (NTS) capacity reference price
- Explore opportunities to optimise UKCS production

Strengthen infrastructure resilience

- Support NTS resilience projects
- Maintain (& enhance if required) flexible supply capability
- Explore commercial viability of flexible supply infrastructure

Thank you

Gavin Williams
Energy Security Strategy Manager

gavin.williams@nationalgas.com

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Up Next: Part II – 11:40

Part II Speakers

William Knight
Head of Hydrogen to Power

Department for Energy Security & Net Zero

Phoebe Finn
Policy Manager

STATERA

Marcus Gurske
Executive Director

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William Knight

Head of Hydrogen to Power
Department for Energy Security & Net Zero

Department for Energy Security & Net Zero

Hydrogen Update: Hydrogen’s role in a clean power system

Dr Wil Knight

Department for Energy Security and Net Zero

April 2026

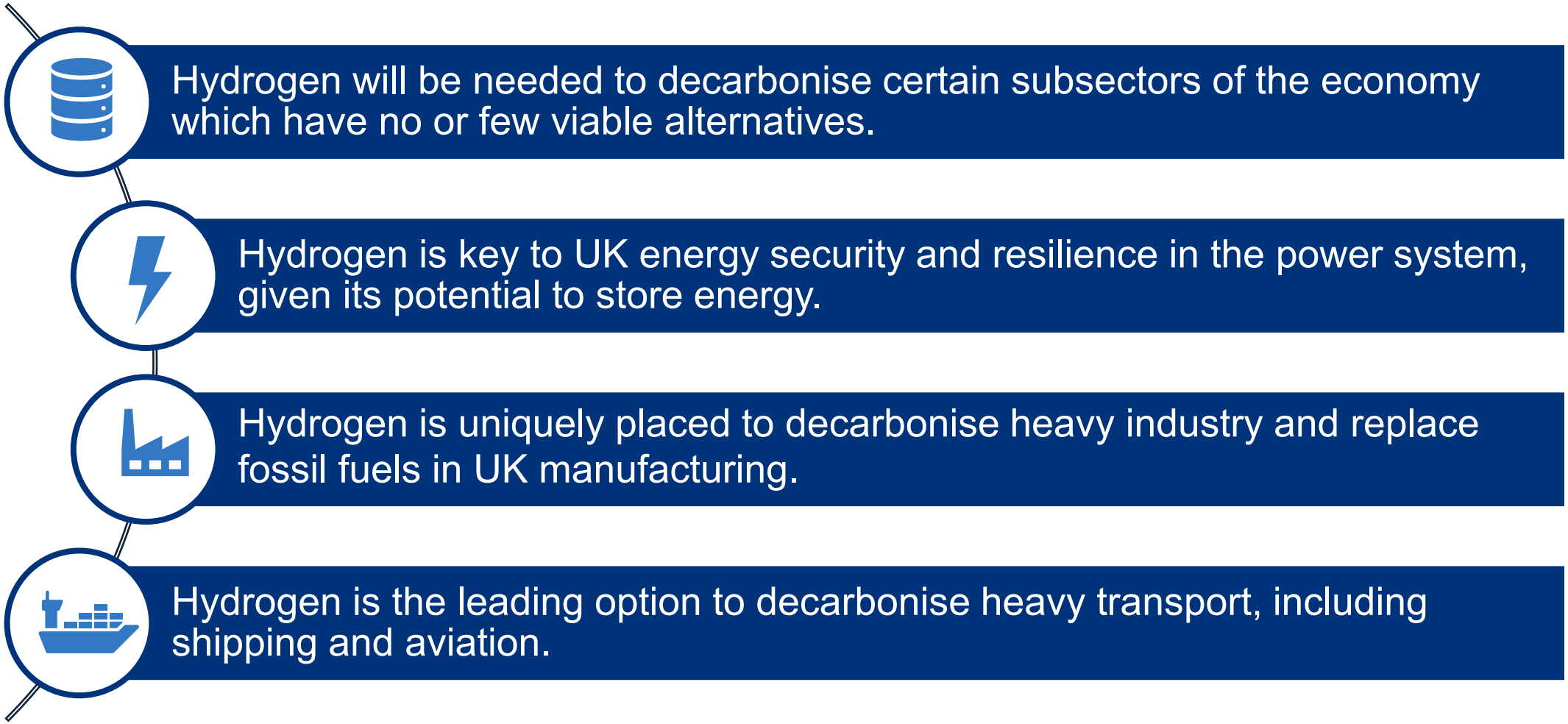
Department for Energy Security & Net Zero

Hydrogen Update

- The UK Government is firmly committed to establishing a thriving hydrogen sector in the UK.
- In 2025, the Government confirmed over **£500m support for hydrogen infrastructure**. This will enable the development of the first regional hydrogen transport and storage network, which will connect producers with vital end users – such as power and industry – for the first time.
- We are working to **publish a renewed UK Hydrogen Strategy, alongside a package of other hydrogen policy documents,** as soon as possible.
- Last week, DESNZ and GBE announced **a funding package to land ITM Power's hydrogen electrolyser manufacturing expansion in Sheffield**. The package includes a £40m equity investment by GBE and up to a £46.5m DESNZ grant, subject to subsidy control scrutiny, final approvals, and completion of a Grant Funding Agreement.

Department for Energy Security & Net Zero

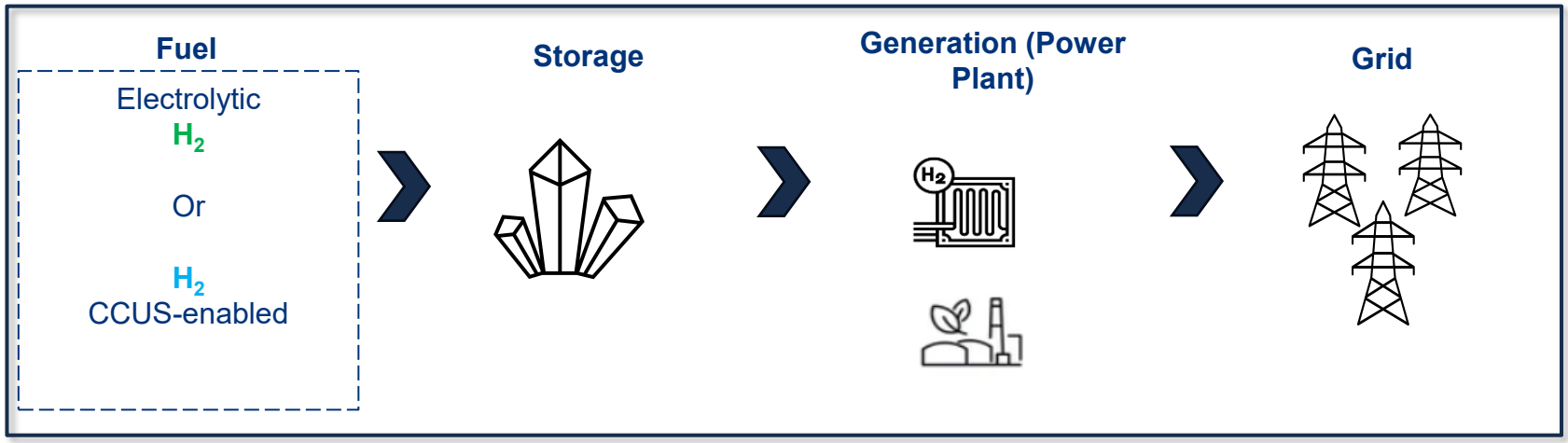
Hydrogen will play a key role in meeting net zero



Department for Energy Security & Net Zero

Hydrogen's role in UK Government's Clean Power Mission

- Hydrogen can play a key role in UK Government's Clean Energy Superpower mission. Transitioning to a renewables-based clean power system will require low carbon technologies capable of ultra long-duration generation to cover extended periods of low renewable output.
- Hydrogen to power (H2P) can deploy at a range of scales, providing a decarbonisation pathway for unabated gas generation, and when connected to large-scale hydrogen storage, is one of very few technologies which can deliver ultra-long duration low carbon generation.
- H2P is expected to be a key demand sector for the future hydrogen economy and will be reliant on enabling hydrogen infrastructure, especially storage, to operate flexibly and support the power system.
- Electrolytic hydrogen production is expected to be able to operate flexibly to make effective use of 'curtailed' electricity to support efficient power system operation.



Department for Energy Security & Net Zero

Hydrogen to Power Business Model

Government is developing a hydrogen to power business model (H2PBM) to de-risk investment and mitigating identified deployment barriers for H2P to accelerate deployment.

The H2PBM will be based on the Dispatchable Power Agreement developed for pCCUS.

Clean Power Mission
Delivering and maintaining a Clean Power System is one of the Prime Minister's five national missions.

Hydrogen to Power
The 2024 Clean Power Action Plan outlined how H2P can provide low carbon dispatchable generation at a range of scales to support a clean and secure power system.

H2PBM will de-risk investment and enable the accelerated deployment of H2P
The H2PBM will mitigate our identified H2P deployment risks of higher FOAK costs and "cross chain risks" from a nascent hydrogen economy.

"The purpose of the H2PBM is to de-risk investment in H2P, accelerating deployment of the technology and supporting a secure, cost effective and clean power system"

Department for Energy Security & Net Zero

Delivering Hydrogen to Power

- DESNZ is finalising H2PBM eligibility criteria proposals. We informally engaged industry in December on the potential eligibility criteria, and we are reviewing stakeholder feedback.
- We intend to publish formal eligibility criteria proposals alongside an Expression of Interest for potential H2P projects soon.
- Intend to publish a H2PBM ‘Commercial Update’ later this year outlining the proposed payment design. DESNZ is working with Cornwall Insights to support development of payment design options. ~
- We intend to take new primary powers to ensure the Hydrogen to Power Business Model addresses the unique challenges H2P faces as a First of a Kind (FOAK) technology and that it can integrate into the wider hydrogen value chain. We intend to legislate when parliamentary time allows.
- We aim publish the Hydrogen Strategy and to progress to the Invite to Offer stage of HAR2 awards as soon as possible, and aim to both award those contracts and launch HAR3 in 2026 with a more streamlined process shaped by industry feedback.
- We are also progressing the design of the hydrogen transport and storage business models and the first allocation round at pace.

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Phoebe Finn

Policy Manager
Statera Energy

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Hydrogen’s Role in the Future Energy System

April 2026

Renewable power will increasingly be wasted in Scotland

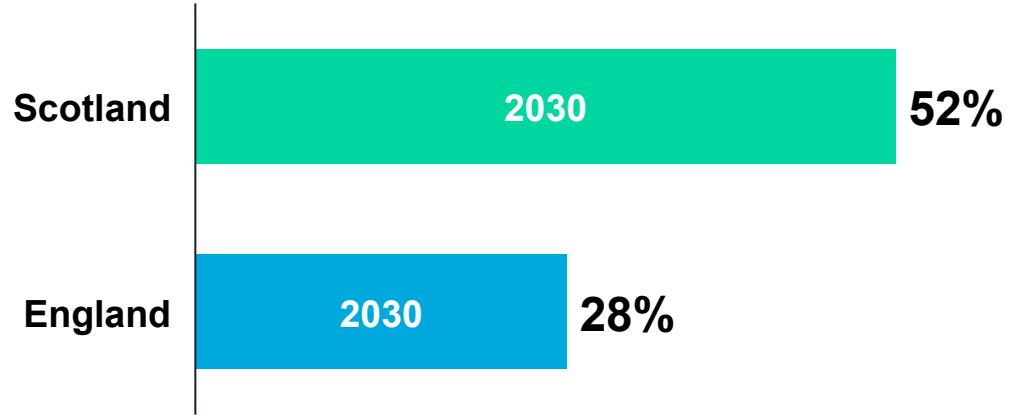
The Challenge

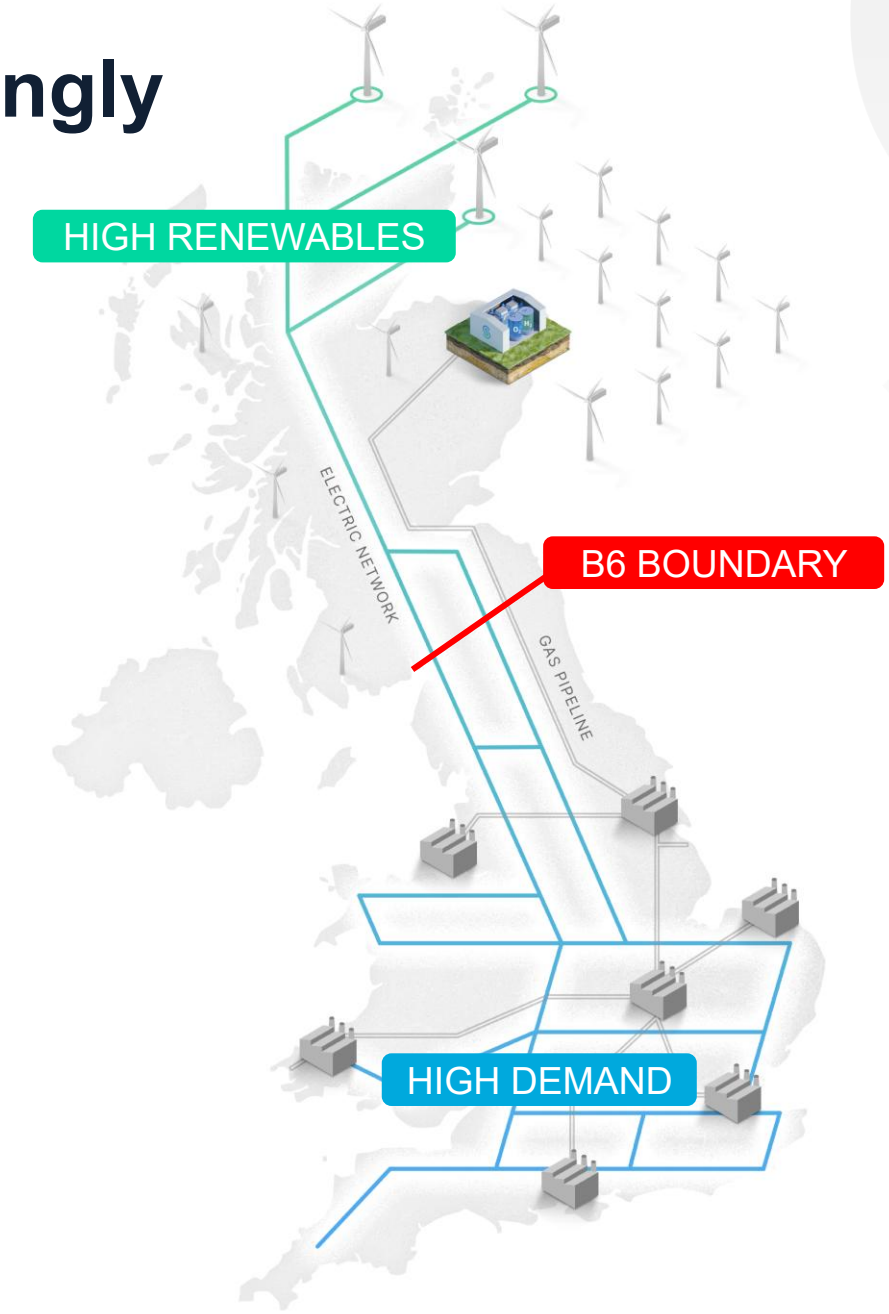
Energy supply and demand are far apart

Network capacity is not sufficient

High cost to balance the system

Percentage of zero priced hours, 2030





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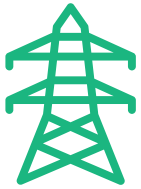
Alternative 1: More demand in Scotland

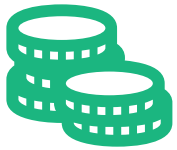
The best alternative to hydrogen to manage excess renewables in Scotland is having more demand – but only if it is flexible demand.

Pros

Keeps energy local

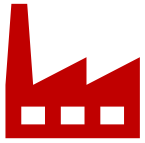


Avoids curtailment and network build



Strengthens local economies

Cons



Most demand is inflexible (industry, housing, data centres)

Fixed demand can increase constraints at the wrong time

Limited ability to scale within the 2030s

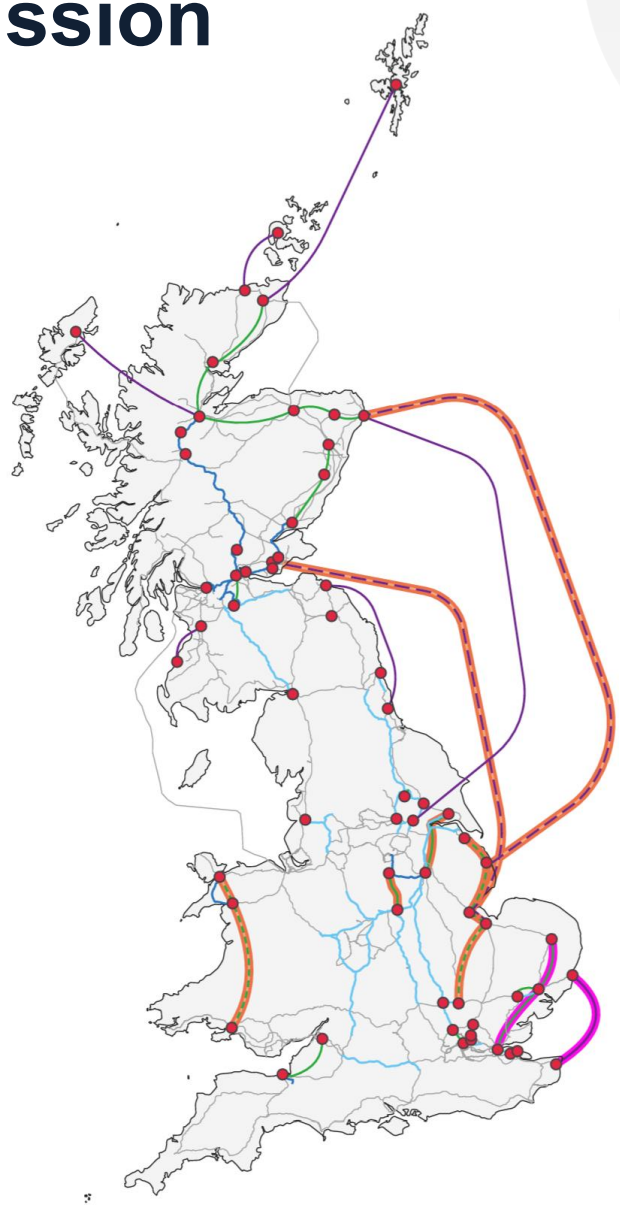
Alternative 2: More electricity transmission network

Transmission is capital-intensive and slow to deliver

- Map of 2030 transmission network reinforcements for CP2030 represents **£60bn of investment**
- Orange dashes lines represent reinforcements required for CP2030, but **current delivery date estimates are after 2030**

Indicative economics

- Cost of a new HVDC cable is **more than £3bn**
- Low utilisation and very high cost per MWh moved suggests alternatives could have significant value



Alternative 3: More Long Duration Energy Storage

LDES helps — but the volume and duration of oversupply means even 20+ hour storage is not enough.

What LDES can do

✓ Shift energy across hours or a day

✓ Provide system resilience.

✓ Valuable firming asset

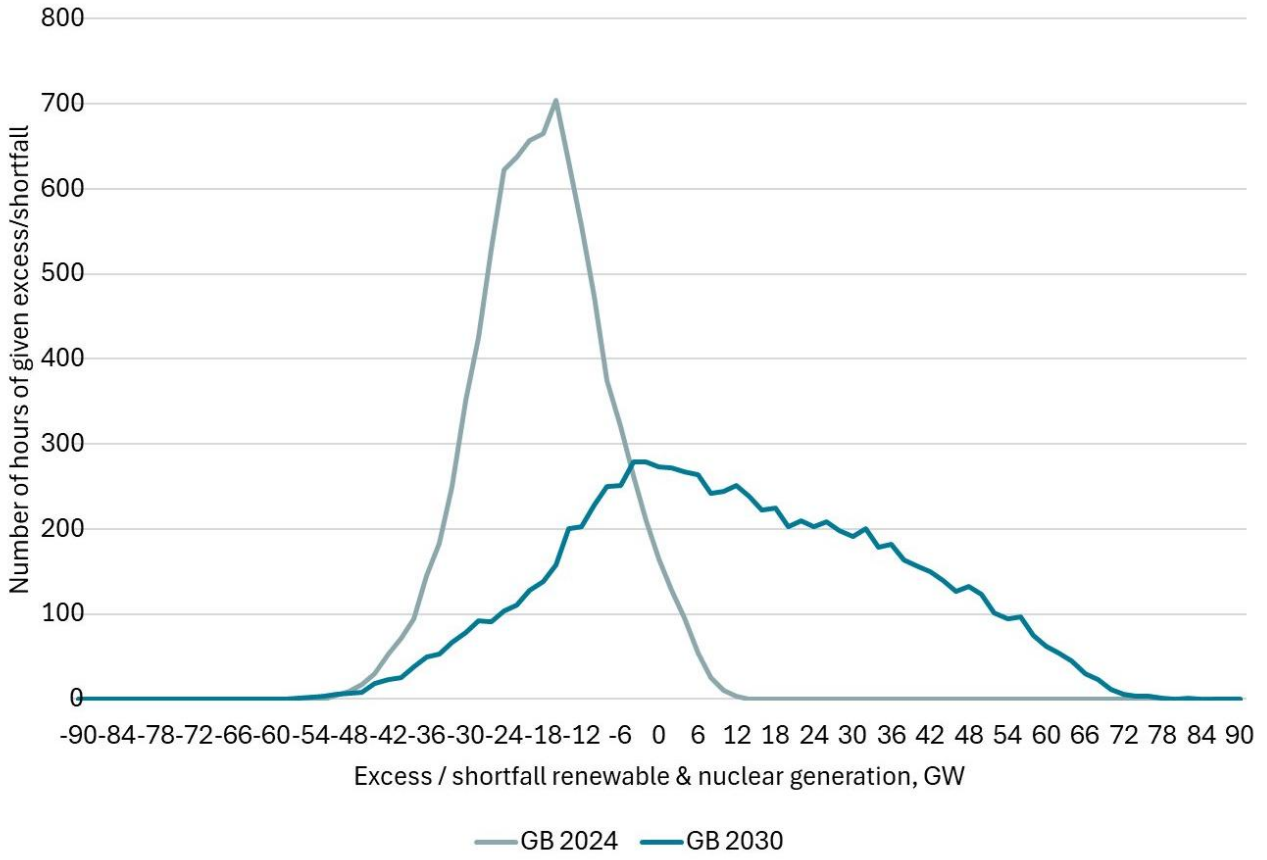
Limitations

✗ Typical durations: ~8–30 hours

✗ Insufficient for multi-day oversupply

✗ Scale required becomes prohibitive

Hours of excess renewable generation: 2024 vs 2030



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Kintore Hydrogen

Kintore Hydrogen is a proposed 3GW green hydrogen electrolyser facility in Aberdeenshire, with a first phase of up to 500MW.

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Blending is a low-regrets option that cuts curtailment

Kintore, at 500MW electrolyser in Scotland would reduce constraint costs by £145m and volumes by 2.1TWh in 2030

Blending benefits of a 500MW electrolyser, 2030

11% reduction in Scottish constraint volumes

£145m reduction in constraint costs

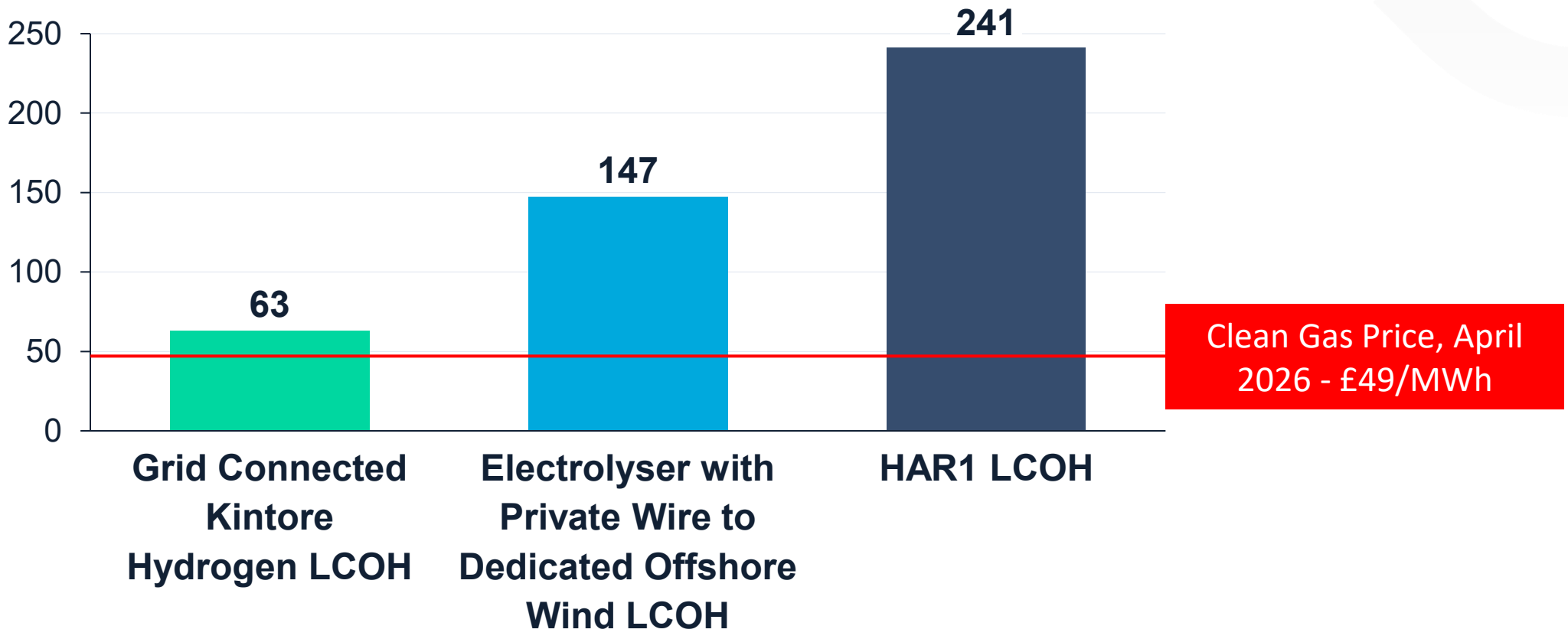
Gas cost savings from blending, 2030

Gas replaced by hydrogen	2TWh
Gas cost savings (wholesale)	**£80m**
Gas cost savings incl. ETS price	**£134m**
Gas cost saving incl. social value for carbon	**£220m**

Hydrogen is cheapest where power is constrained

Grid-connected electrolysis in Scotland is lowest cost and only grid connected projects reduce curtailment.

Levelised Cost of Hydrogen (£/MWh)



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Policy ask: transmission blend

Blending targets the right problem

Uses surplus power behind constraints, only in periods of oversupply

Reduces both curtailment and H2 production costs

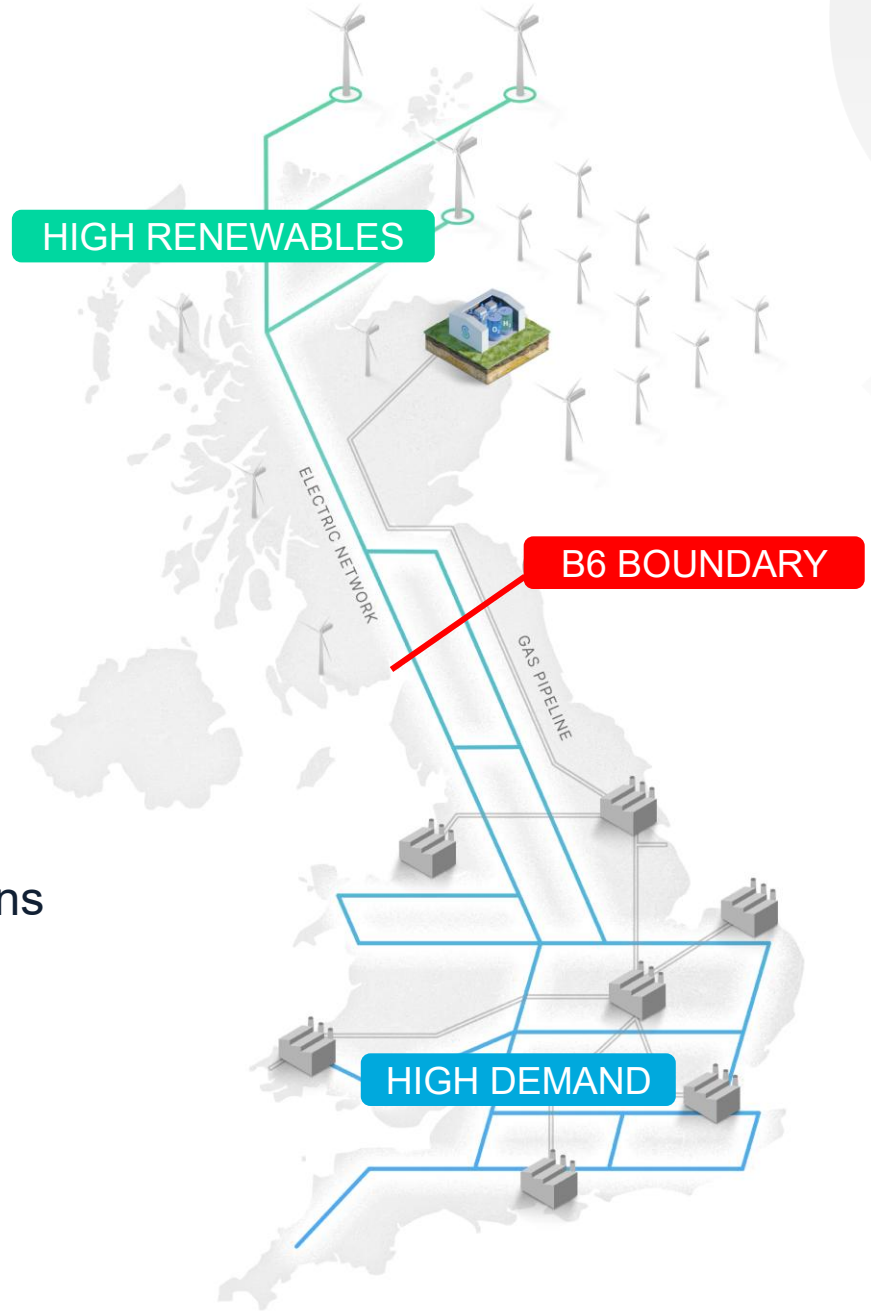
Creates jobs and growth in Scotland

Immediate solution that paves the way for the future system

It uses existing infrastructure with no need for new pylons

Hydrogen production can locate strategically

Avoids locking in higher-cost solutions



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Marcus Gurske

Executive Director
World Gas Conference 2028


WORLD
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CONFERENCE
30th Edition | London, UK | 15-18 May 2028
Presented by International Gas Union
WGC2028 Conference Brief

Conference Theme

Driving Human Progress and Global Growth

History of the International Gas Union - Over 90 years of Gas advocacy

22nd World Gas Conference
Tokyo, 2003

27th World Gas Conference
Washington, 2018

The International Gas Union (IGU) is the spokesperson of the global Gas industry. Working as a worldwide, not-for-profit membership organisation, IGU acts as a credible advocate of political, technical and economic progress across the industry value chain. IGU works to improve the competitiveness of Gas in the world energy market by promoting transparency and by fostering collaboration with governmental agencies and multilateral organisations.

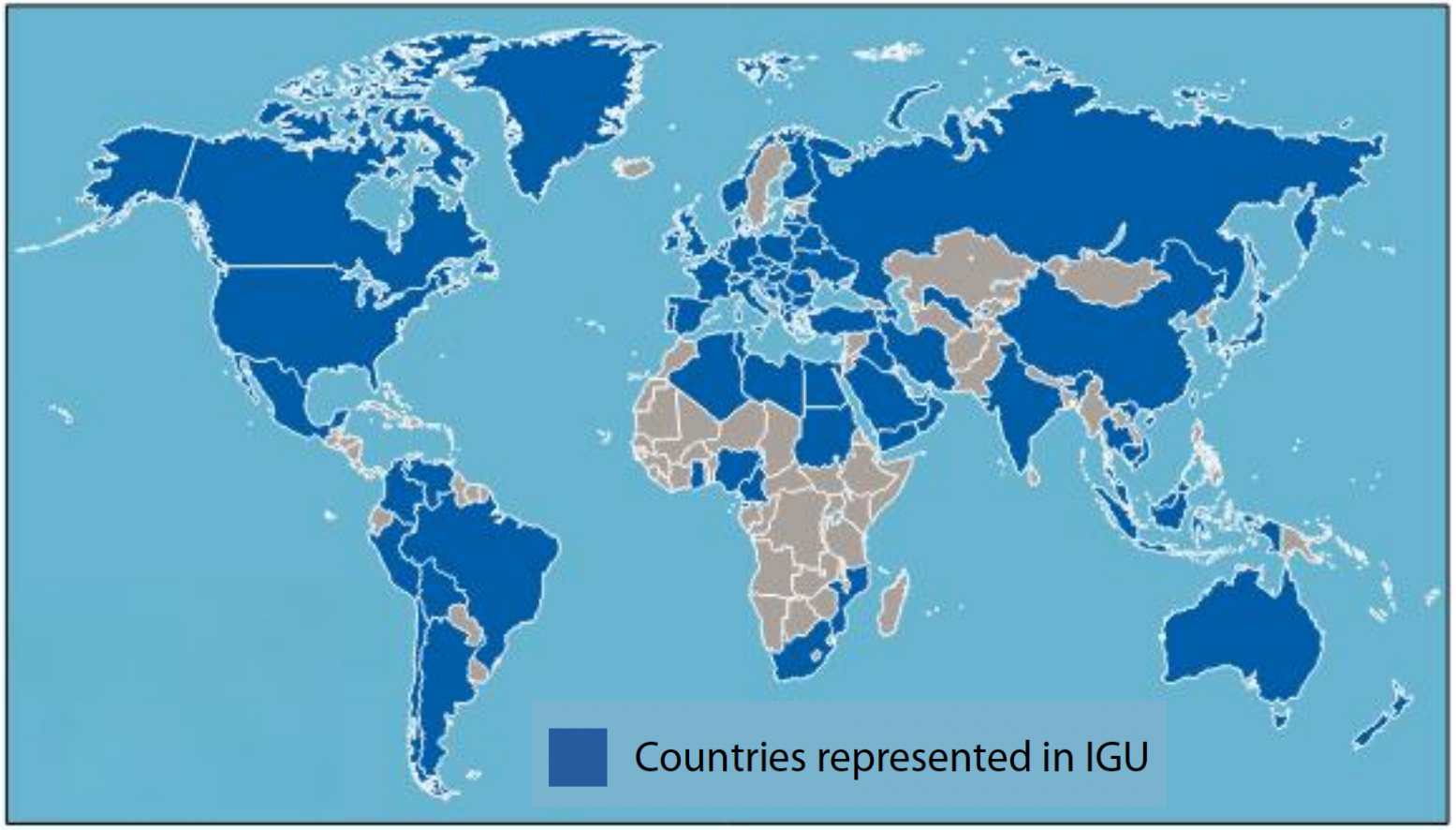
"The IGU is the leading global voice of Gas in all of its forms, natural, liquefied and low-emission, such as biomethane, hydrogen and e-methane, driving innovation and collaboration to accelerate a secure, affordable, equitable and sustainable energy future."
- IGU Manifesto

History of the International Gas Union - Over 90 years of Gas advocacy

International Gas Union

The IGU covers over 90% of the global Gas market.

70 Charter members
57 Associate Members
17 Premium Associate Members
13 Affiliate Organisations
9 Observers



World Gas Conference 2028 - London, UK - May 15-18

WORLD GAS CONFERENCE
30th Edition | London, UK | 15-18 May 2028
Presented by International Gas Union

The Premier Global Gas & Energy Event

Conference Sub Themes:

- The Role of Gas in a Balanced Energy Future
- Gas At The Centre of Sustainability
- Gas Contributes To Prosperity
- Gas Delivers Energy Security
- Advocacy
- Finance
- Technology & Innovation

The World Gas Conference (WGC) is the leading global gathering of the Gas and energy industry, bringing together leaders, policymakers, and innovators from across the value chain. WGC takes place triennially across an array of international locations.

WGC provides an unmatched platform for networking, information sharing, and business development. The conference brings together thousands of delegates and visitors from across the energy sector.

29th World Gas Conference

Beijing, 2025

History of the World Gas Conference - Over 90 years of convening energy leaders

WORLD GAS CONFERENCE
30th Edition | London, UK | 15-18 May 2028
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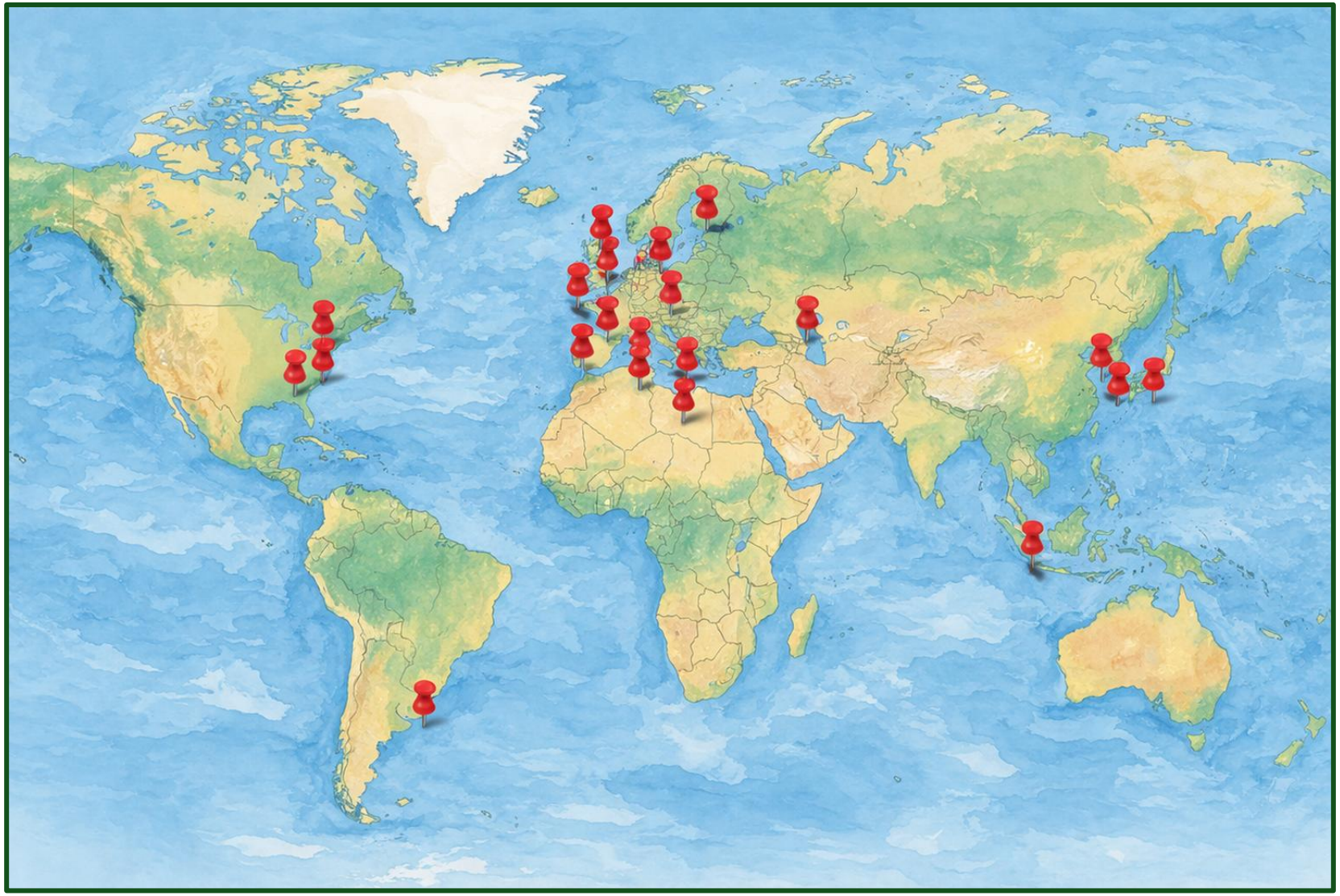
Previous WGC Locations



World Gas Conference 2028 - London, UK - May 15-18

WORLD GAS CONFERENCE
30th Edition | London, UK | 15-18 May 2028
Presented by International Gas Union

Who attends?

- Energy executives
- Government ministers & policymakers
- Investors & analysts
- Technology providers
- Gas professionals

7th World Gas Conference Rome, 1958

Why attend?

- Network with global energy industry leaders
- Gain insights into energy evolution/addition and global Gas markets
- Discover cutting-edge innovations
- Engage in high-level strategic discussions

26th World Gas Conference Paris, 2015

Next Step - Getting Involved

Exhibition

- Lodgement of Booth Expression of Interest form
  - Up to 5 preferred locations
  - Notation of preferred dimensions
  - Desired adjacencies
- Return to exhibition organiser
  - Jason.Berman@wgc2028.com
- Offers will outline location, pricing, and payment terms
- Planned Site Briefings
  - May 2027 & November 2027

Sponsorship

- Designed to provide bespoke customisation to sponsor's preference
  - Credit framework will return
  - Expect new elements, broadening choice.
- **Official launch will be May 2026**


WORLD GAS CONFERENCE
30th Edition | London, UK | 15-18 May 2028
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We look forward to seeing you on 18th June 2026

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