national gas transmission

Preliminary Safety Monitor Requirements 2025/26

May 2025

Safety Monitor Requirements

Executive Summary

The Preliminary Safety Monitor requirements this year for Space and Deliverability are 0GWh and 0GWh/d respectively. This is equal to the requirements calculated in September 2024 for Winter 2024/25 which were 0GWh for Space and 0GWh/d for Deliverability. This is based on a preliminary Non-Storage Supply (NSS) assumption of 400 mcm/d or 4400 GWh/d. It is acknowledged that should the Non-Storage Supplies (NSS) figure change through the winter period, National Gas Transmission reserves the right to review the monitor to reflect such changes and ensure a reasonable degree of accuracy.

Introduction

This document sets out 'Safety Monitor' for the 2025/26 Winter, pursuant to the obligations of National Gas Transmission under the Uniform Network Code (UNC), Section Q.

The preliminary safety monitor provided in this note uses our initial 2024/25 demand forecasts and our latest supply analysis. Our demand forecasts are yet to be completed for 2025/26, and some elements of our supply analysis are to be finalised. These will potentially lead to changes in the final monitor published in September.

It is our responsibility to keep the safety monitor under review (both ahead of and throughout the winter) and to make adjustments, if it is appropriate to do so, on the basis of the latest information available. We will continue to provide within winter feedback to industry regarding supply assumptions and any resulting changes to safety monitors by means of monthly updates via Operational Forum meetings and information on our web site. In doing so, we must recognise that the purpose of the safety monitor is to ensure an adequate pressure can be maintained in the system at all times and thereby protect public safety.

Background

The Uniform Network Code (UNC) requires us to publish the safety monitor and to provide regular reporting of actual storage stock levels for comparison with the monitor. As the name suggests, the focus of the safety monitor is public safety rather than security of supply. It provides a trigger mechanism for taking direct action to avoid a potential gas supply emergency (as defined in the Gas Safety (Management) Regulations).

Methodology

There continues to be two main steps in the assessment of the safety monitor:

- The calculation of the total storage requirement at the start of the winter
- The assessment of the way in which this initial requirement declines as the winter progresses, known as the winter profile. This second step also includes an assessment of how the total storage deliverability requirement reduces as the winter progresses.

This note only covers the first step, by providing a preliminary assessment of the safety monitor space requirement. The safety monitor requirement is highly dependent on the assumptions made regarding the aggregate level of non-storage supply (NSS). Once the winter consultation process is complete, we will publish the final safety monitor in September, including the monitor storage space requirement and the deliverability requirement.

Safety Monitor Calculation Process

The concept behind the safety monitor is to ensure that sufficient gas is held in storage to support those gas consumers whose premises cannot be physically and verifiably isolated from the gas network within a reasonable time period. To achieve this all gas consumers are categorised into one of two groups:

- Protected by Monitor - Gas is held in storage to facilitate continuity of supply to these consumers even in a 1 in 50 winter.
- Protected by Isolation – Network safety would be maintained, if necessary, by physically isolating these customers from the network

The categorisation into these groups is summarised in the table below:

Table 1: End Consumer Categorisation for Safety Monitors

Protected by Isolation - Sites which can be safely isolated from the network	Protected by Monitor - Sites which require protection under the safety monitor
NTS Power	Priority[1] DM2
NTS Industrial	NDM
DM (excluding priority customers)	Exports to Ireland for NDM
Exports to Ireland for DM	

The safety monitor storage requirements comprise two elements:

[1] Currently, priority daily metered (DM) loads represent less than 2% of protected by monitor demands.

- **Supply-demand**: Storage required to support 'protected by monitor' loads, assessed using a severe (1 in 50) winter load duration curve and assumed supply levels.
- **Isolation**: Storage required during the process of demand reduction, effectively to support 'protected by isolation' loads during the period in which these loads are isolated from the system.

Supply

There continues to be uncertainty regarding the aggregate level of non-storage supplies especially the individual components of these supplies. LNG and interconnector imports continue to be elements with most uncertainty. The focus of the safety monitors is public safety and hence, it is prudent to ensure that the assumed level of NSS will be available throughout the winter, notably at times of high demand.

Our final view of supplies for next winter will be detailed in our Winter Outlook Report document to be published in October. Our NSS assumptions can be summarized as follows:

- Rather than use our forecasts for NSS for winter 2025/26, our NSS assumption is based upon a NSS versus demand relationship based upon a weighted rolling average of the last five years of historic data.

- Analysis of previous winters' data shows that assuming an NSS availability of 98% captures typically 98% of all data points, with those that are still below often the result of short-term supply losses.

Table 2 shows the anticipated availability of storage capacity in winter 2025/26.

Table 2: Storage Space and Deliverability Assumptions

Storage Type	Space (GWh)	Deliverability (GWh/d)
Medium (MRS)	18,992	1,165
Long (Rough)	16,554	88
Total	35,476	1,253

Demand

The demand background used for the analysis in this section uses our demand forecasts for 2024/25 that were produced in June 2024: the final safety monitor will be based upon our final 2025 demand forecasts for 2025/26.

Preliminary Safety Monitor Levels

Table 2 shows the preliminary Safety Monitor requirements for Space and Deliverability.

Table 2 – Stored Safety Gas and Storage Deliverability Requirement

Assumed total storage space (GWh)	Space (GWh) Safety Monitor (GWh)	Space requirement (%)	Assumed total storage deliverability (GWh)	Deliverability Safety Monitor (GWh/d)	Deliverability requirement (%)
35,476	0	0%	1,253	0	0%

The Safety Monitor space and deliverability requirements for Winter 2025/26 are in line with last year's requirements.

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