Securing Britain's Energy

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National Gas

Westminster Energy Forum
4 November 2026

National Gas is Securing Britain's Energy.

national gas transmission

- The National Transmission System (NTS)
- Gas System Operator (GSO)
- Network Emergency Co-ordinator (NEC)

national gas metering

Over 6 million traditional gas meters.

national gas services

24/7 emergency response service for the industry.

We own and operate the National Transmission System (NTS) connecting customers across Britain:

100% All GB gas imports and exports go through the NTS.

500k Businesses and industries supplied by gas in Britain.

30GW Dispatchable power capacity provided by gas.

99% NTS reliability and availability in recent years.

- **35** power stations
- **15** major industries
- **9** storage sites
- **4** Local networks
- **3** Interconnectors
- **3** LNG terminals

Almost 5,000 miles of high-pressure steel pipeline

Over 60 jet engine compressors across 21 sites

2.6x the energy transported than by the electricity grid

1/4 of UK annual electricity generated from gas

The NTS supplies c.35% of the UK's primary energy – also securing energy for the island of Ireland and interconnecting with continental Europe.

Agenda

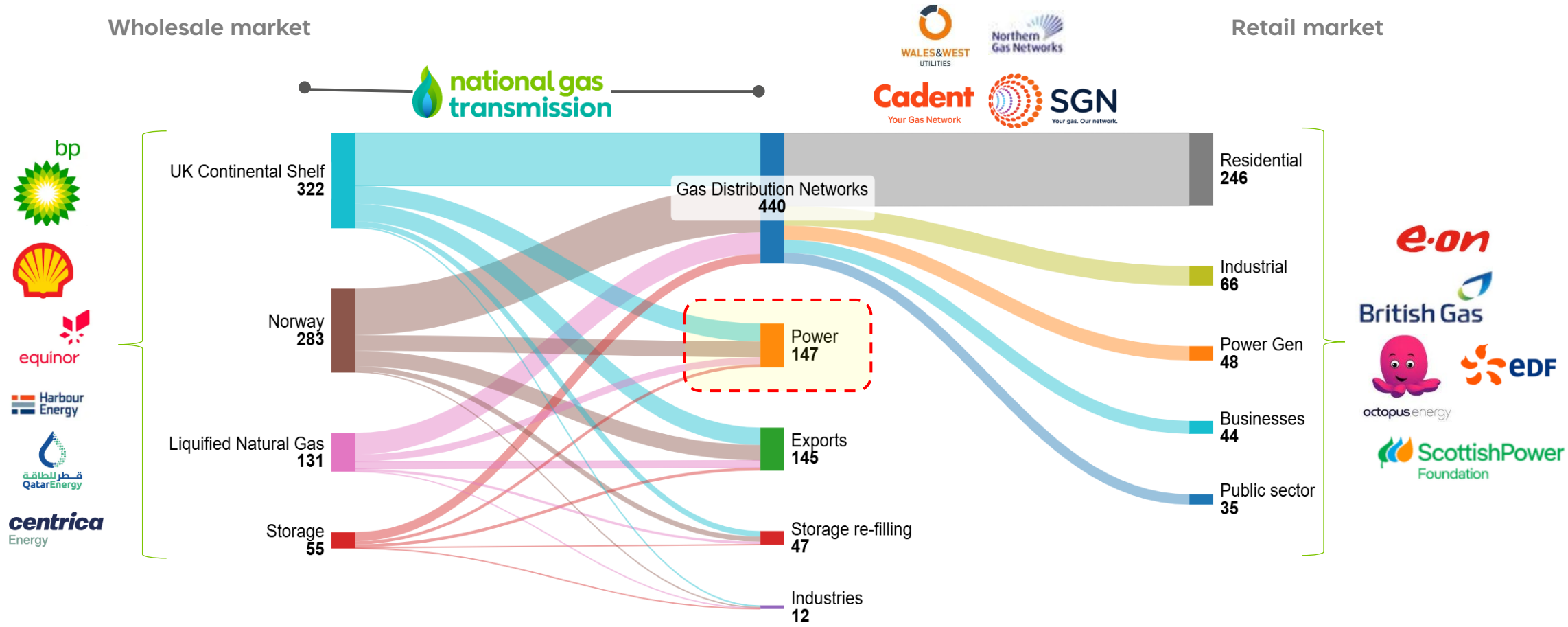
1. The evolving role of molecules

2. The shift from volume to value

3. Delivering long-term security of supply



99% of gas imported, exported and consumed in Great Britain, flows through the National Transmission System.



In 2025 the NTS transported 791TWh of energy, which is ~2.6 more energy transported than by electricity networks.

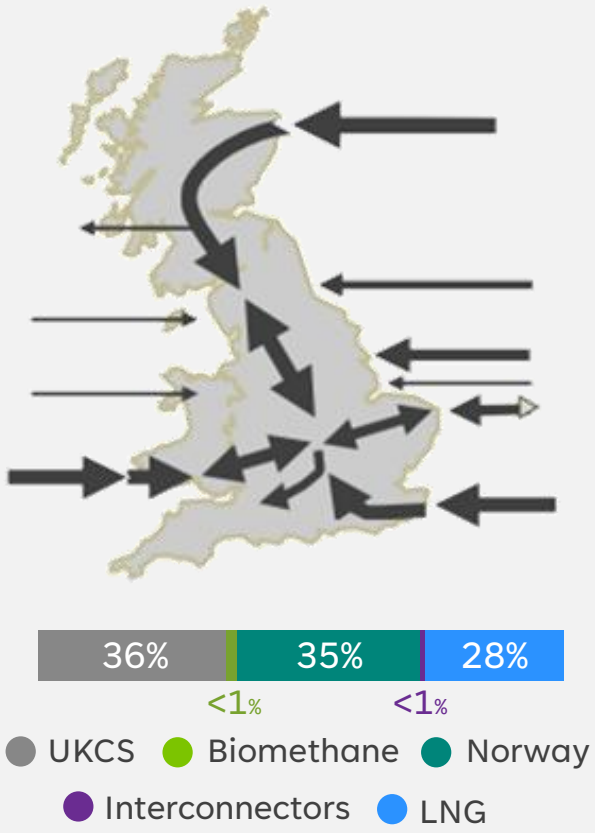
 Sources: National Gas, DESNZ (DUKES), Wood Mackenzie

The gas supply into the NTS has changed significantly in recent decades.

2000: predominantly north to south flows



2026: diverse sources of gas supply



As UKCS production declines, there has been a growing supply diversity to meet demand, in addition to interconnection with continental Europe.

Autumn Budget 2026

The Budget signals a shift towards affordability, investment-led funding and delivery of strategically important energy infrastructure.

Reflections

Support on the **cost of energy bills** was the primary focus of interventions.

With **affordability** the driver of energy policy decisions.

Government is increasingly prioritising **mature, strategically important projects.**

Government support is shifting from grants with **greater emphasis on loans and equity investment**.

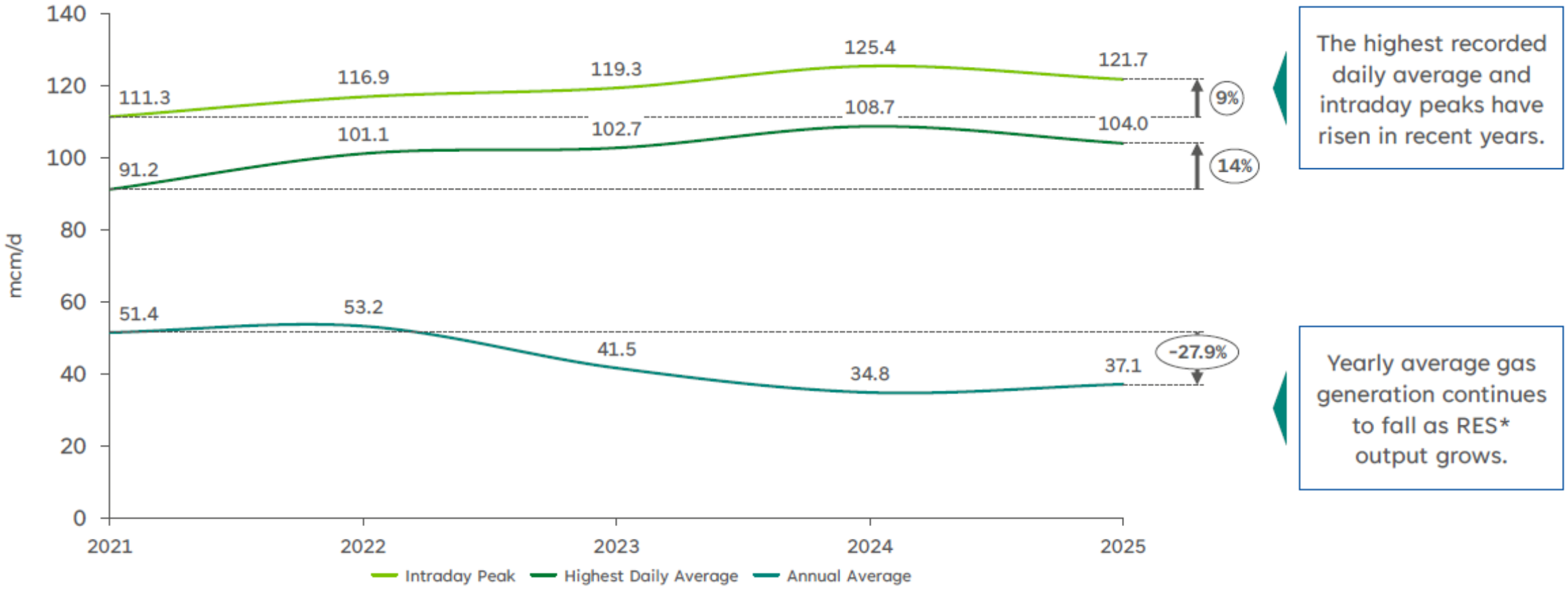
Next Steps

Continue to engage with government on funding pathways for **strategic hydrogen and carbon capture projects**.

Work with government on delivery of its **security of supply consultation** to support a resilient gas system.



Growing intermittency in the power system is reshaping the role of gas-fired generation, resulting in increasingly volatile NTS power sector flows.



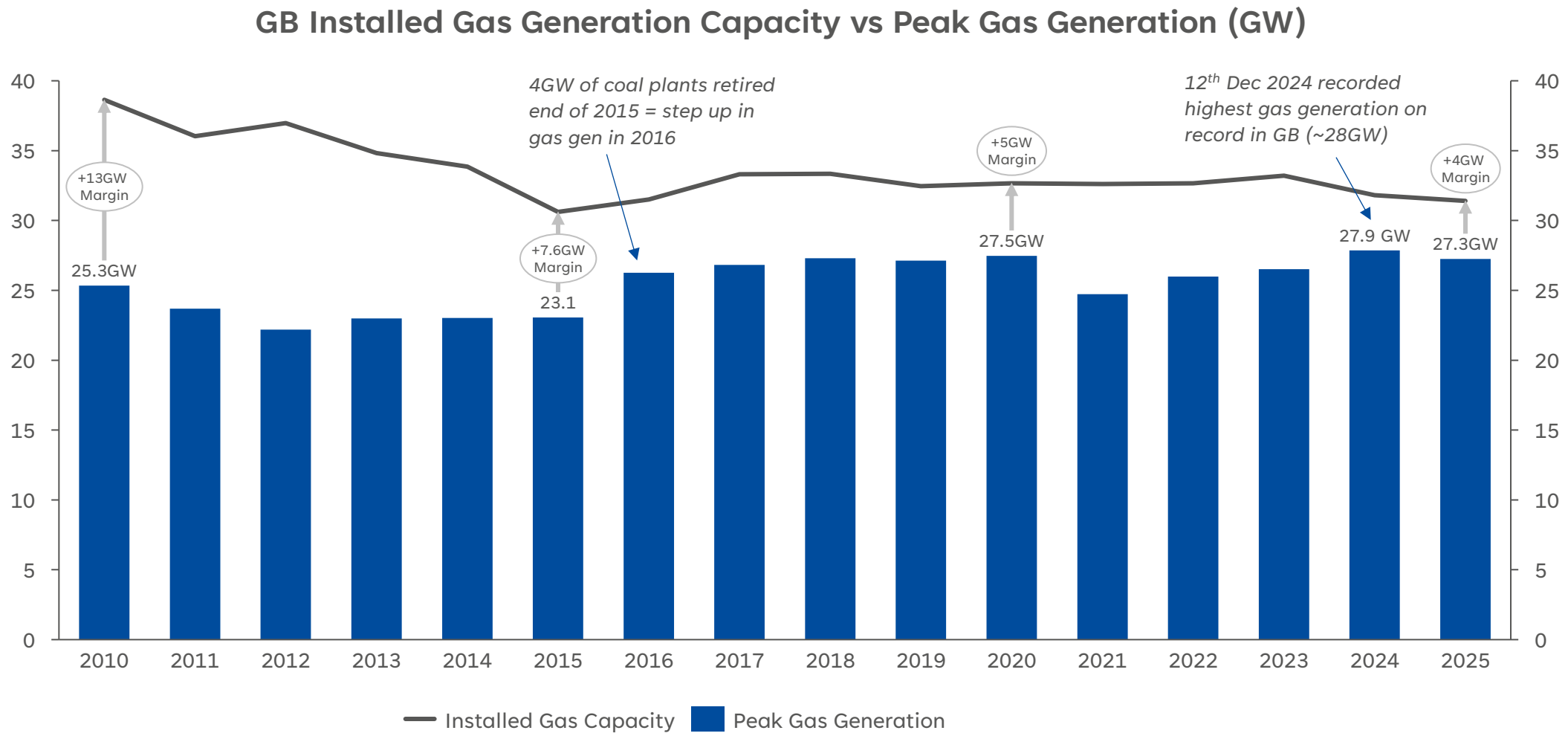
The highest recorded daily average and intraday peaks have risen in recent years.

Yearly average gas generation continues to fall as RES* output grows.

The growing importance of the role of gas in power system flexibility reinforces the need for a resilient gas network and compressor fleet.

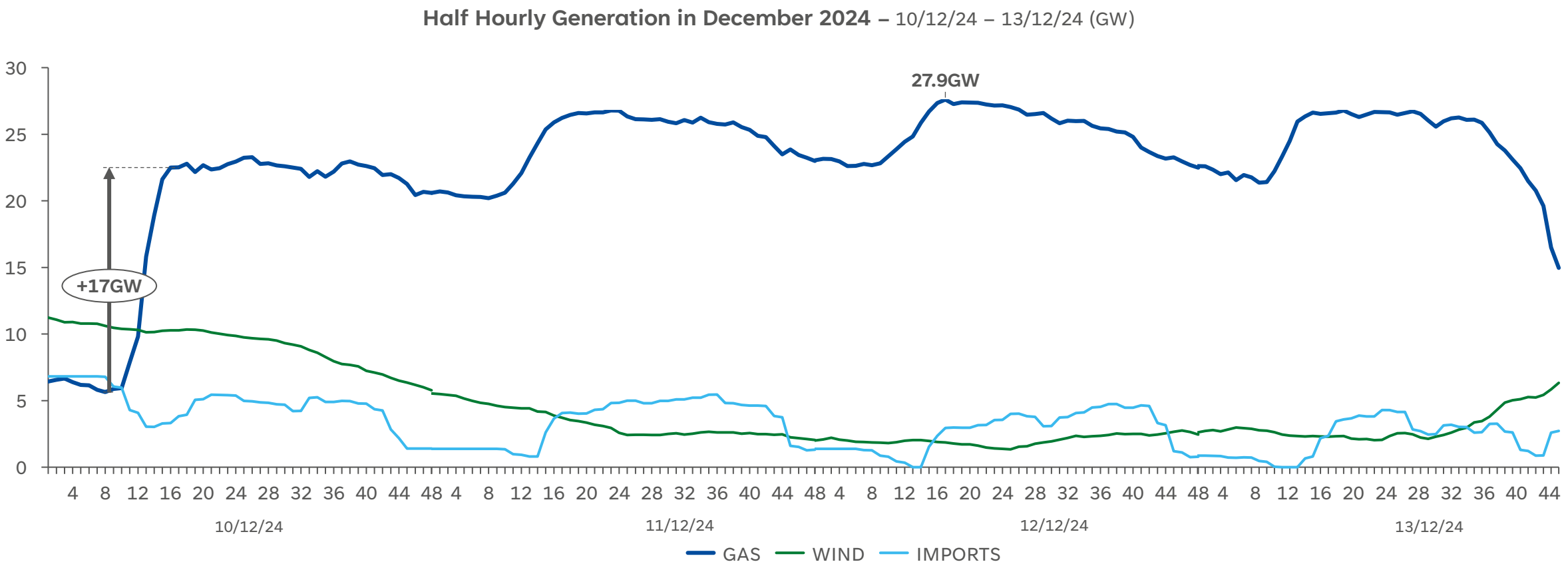
 Source: NESO *Renewable Energy Supply

Installed gas power capacity connected to the NTS has fallen by c.20% since 2010, while peak output has increased by c.8%, tightening margins.



 Sources: DUKES (DESNX), NESO. Peak Gas Generation is the highest reported hourly gas plant dispatch.

Dunkelflaute conditions demonstrate the critical role of gas in supplying long-duration power supply during periods of low wind and imports.

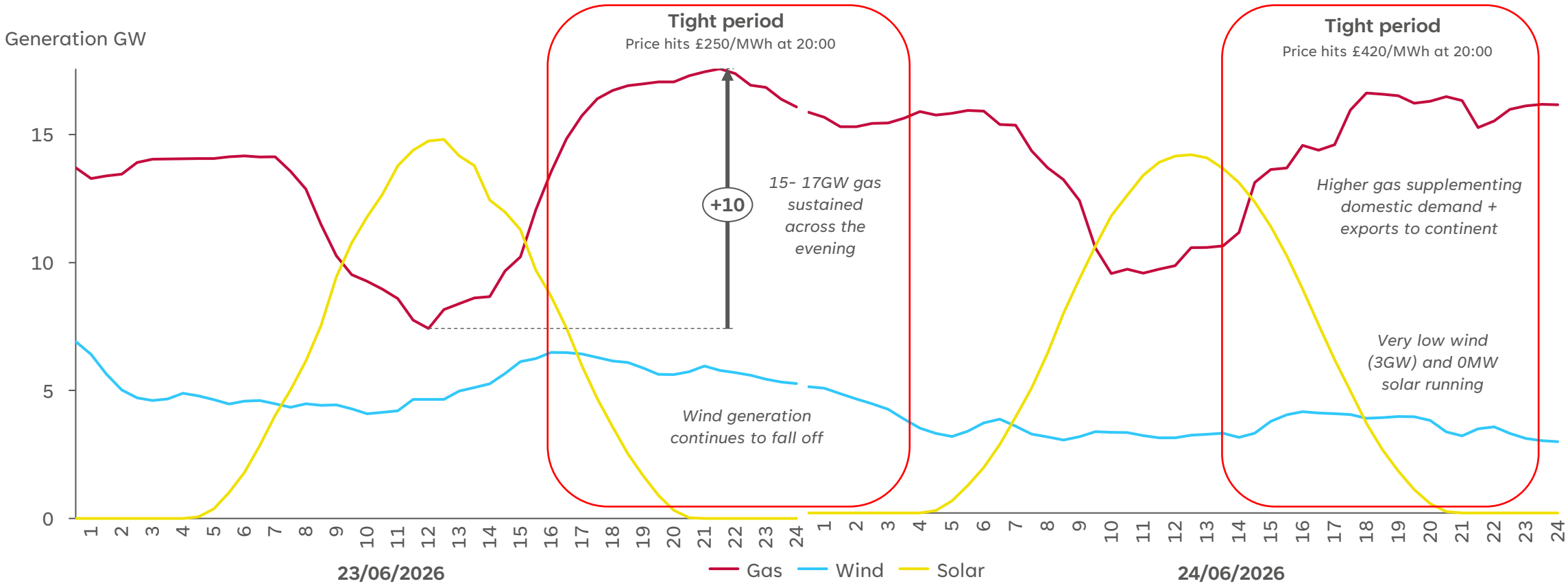


Low wind and high demand across continental Europe and the UK drove sustained gas generation, with gas supplying 65% of power at peak.

 Source: National Gas, NESO.

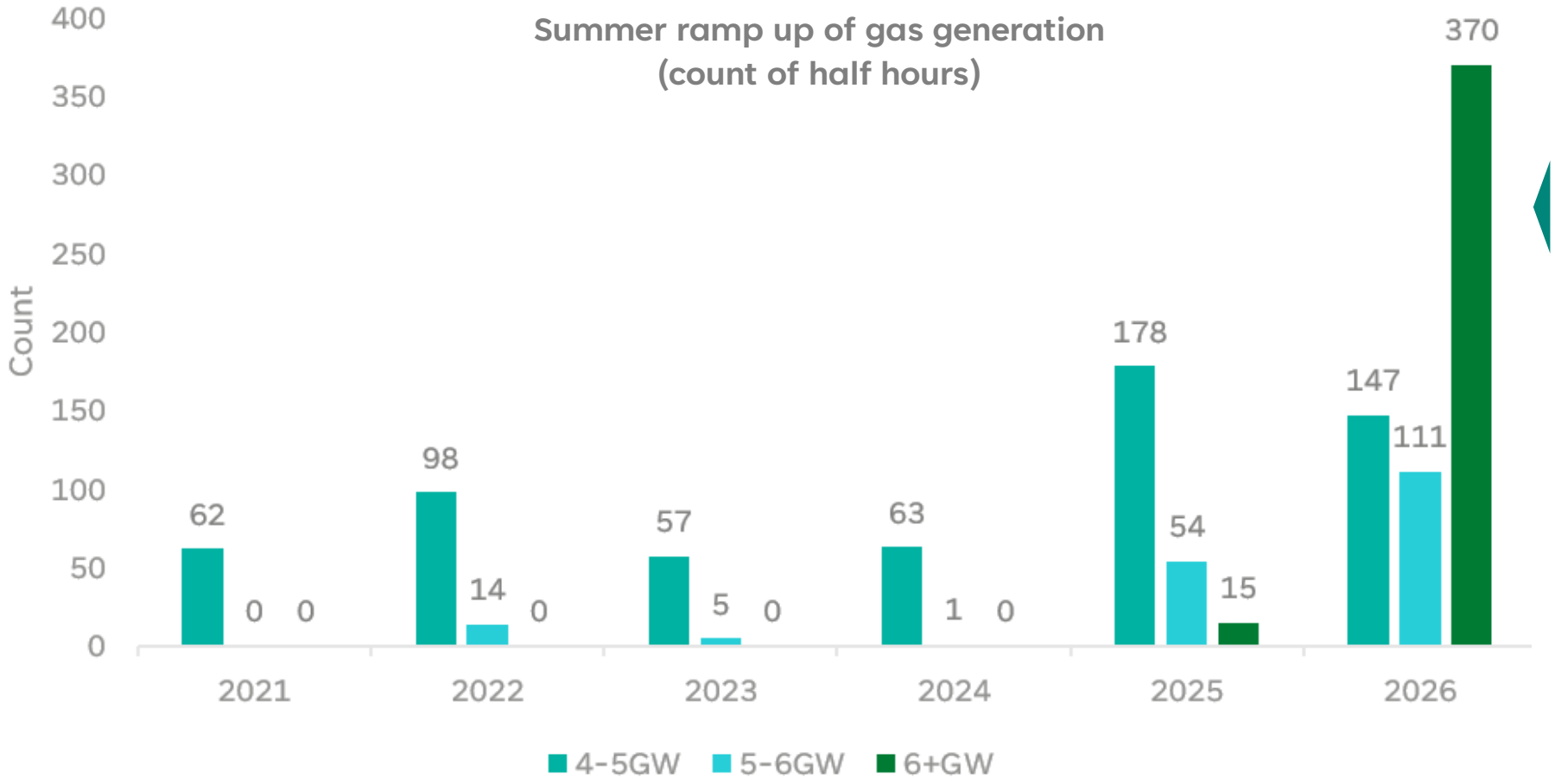
The June 2026 heatwave “Hitzeflaute” highlights the growing role of gas in Summer, driven by low wind generation and higher cooling demand.

Half Hourly Generation in June 2026 – 23/06/26 – 25/06/26 (GW)



 Sources: NESO, EMP (N2EX data), Hitzeflaute is characterised as a sustained period of low wind and high temperatures.

Gas played a crucial power generation role this summer, as heatwaves reduced renewable output and resulted in new operating trends.



The majority of these occurrences were during the June heatwave (Hitzeflaute)

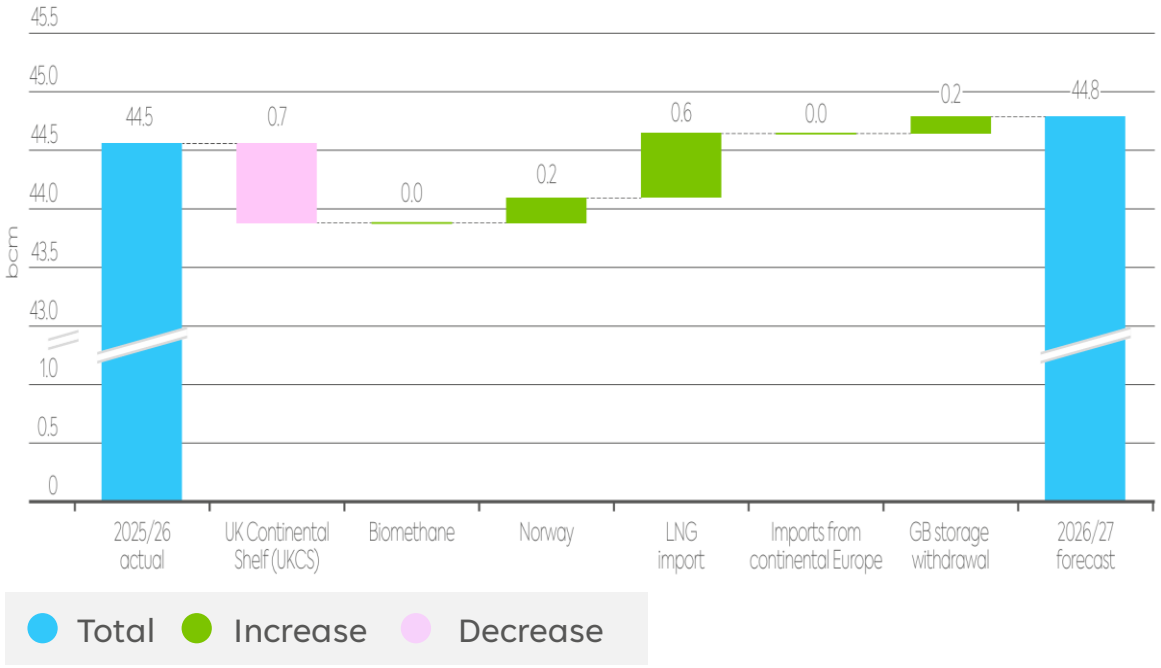
Periods of system stress increasingly highlight the need for flexible, dispatchable generation, to complement renewable sources.

 Sources: NESO – GW gas capacity operating for the period *count of half hours where gas generation increased by >4GW over the previous 6 hrs, 2026* is up to June 26.

Winter Outlook: Supply and Demand Forecast

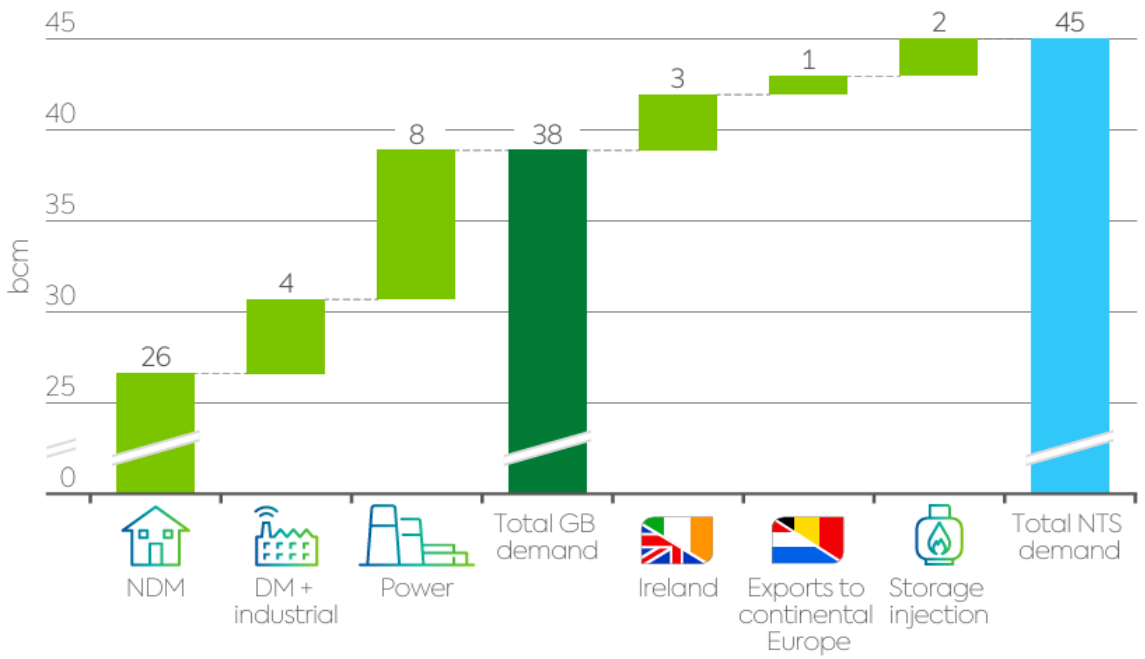
Forecast gas supplies for winter 2026/27

Great Britain is expected to have sufficient supply capability to meet forecast and peak demand this winter.



Forecast gas demand for winter 2026/27

While annual gas demand may fall, peak demand is forecast to rise by 2% in total and increase by 7% in power.

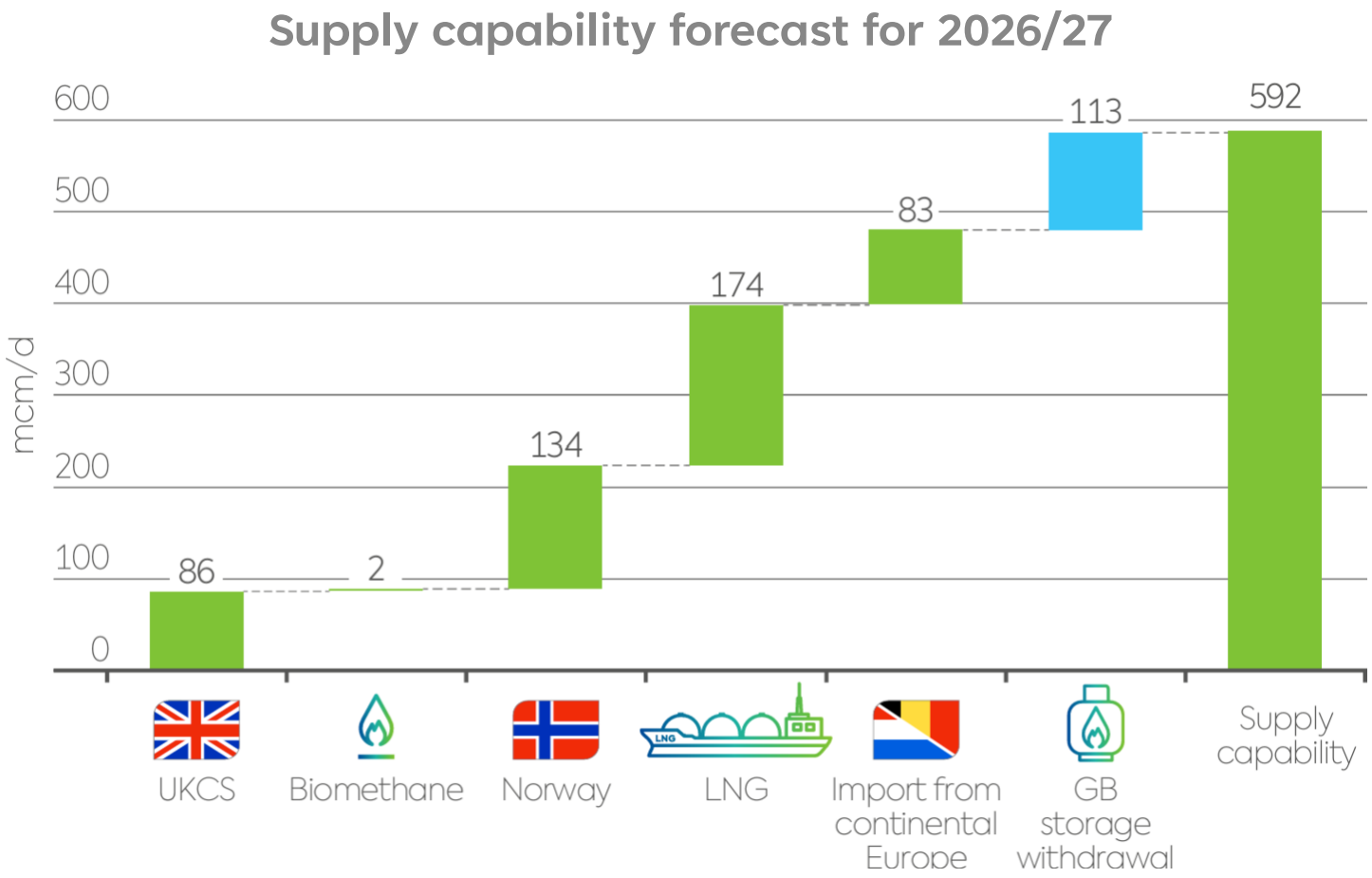


Overall gas demand this winter is forecast to be broadly in line with last year, with UKCS and Norway providing the baseload supplies.

 Source: Gas Winter Outlook 2026

Winter Outlook: Supply Capability

Continental Europe import capacity includes Belgium and the Netherlands, supporting winter supply resilience.





Long Term Security of Supply

Maintaining energy security today, while enabling the transition to tomorrow's energy system.

Key Messages

Gas will remain critical throughout the transition.

Security of supply must evolve.

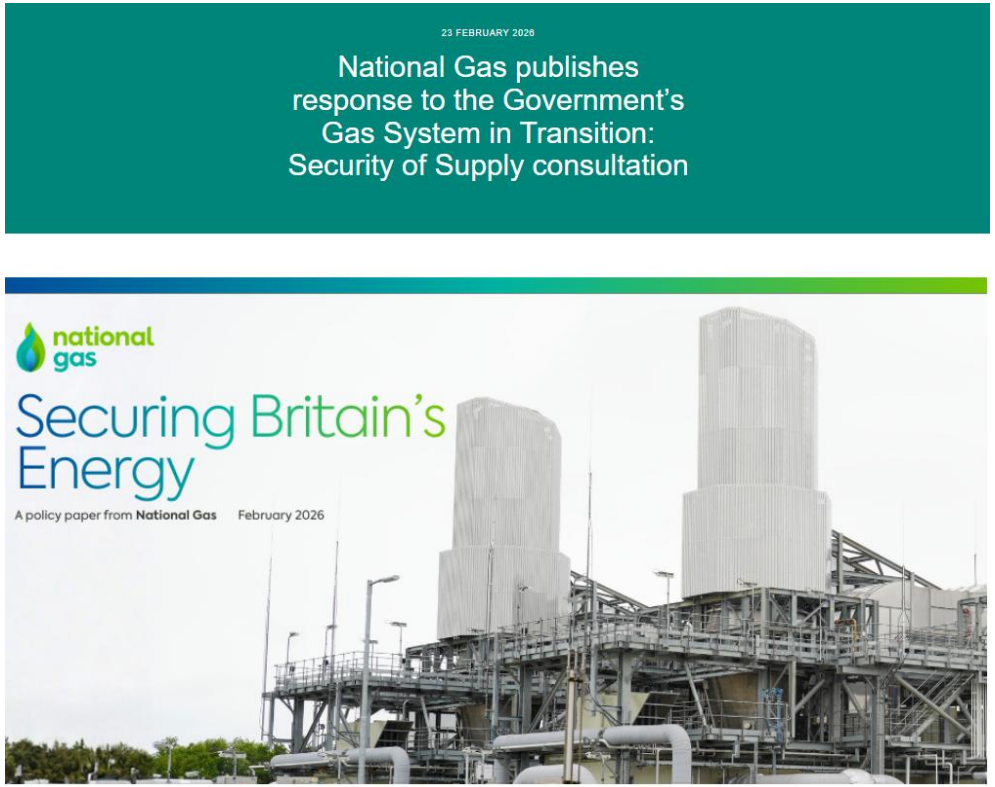
Domestic energy capability matters.

National Gas Priorities

Establish Britain's risk appetite and future gas security of supply standards.

Develop a future-proofed and competitive gas market.

Strengthen gas network and supply infrastructure resilience.



Next Steps for National Gas

We are focussed on delivering the analysis, evidence and stakeholder engagement needed to support future network resilience and energy security.

Planning for GT4



Developing detailed asset plans to:

- Maintain reliability
- Deliver resilience
- Support energy security

To build the evidence base, supporting future investment.

Budget



Upcoming Spending Review:

- Supporting the forthcoming Spending Review process.
- Strengthening the case for future network investment.

Winter Outlook



Winter Outlook 2027/28:

- Commencing analysis for the Winter Outlook 27/28.
- Providing publications to build on the findings of the latest winter Outlook.

Security of Supply



Gas System in Transition (GSIT) consultation:

- Advocating for government to publish the full response on security of supply.
- Preparing our response to the next phase of GSIT: *Recovery of gas network costs during the transition.*

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National Gas Energy Forum - 28 January 2027 9:30am

Thank you.

We hope you can join us at the next National Gas Energy Forum.

28th January 2027, Institution of Mechanical Engineers,
One Birdcage Walk, London, SW1H 9JJ