

Gas
Transmission

GMaP Webinar - Shaping the Future

Date: 16th November 2020
10:00am – 11:00am

We will start at 10:02 to allow people to join
the webinar

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#NGG7

Have your say.

Thank you for joining us today
Please feedback via Teams chat

Tell us what matters to you

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<https://www.sli.do/>

Or

Search for Sli.do



Who will be speaking today?

**Helen
Campbell**
Head of Strategy &
Performance, FoG
Chair



Neil Rowley
Gas Market
Development
Manager



Bill Goode
Senior Development
Lead



**Susannah
Ferris**
Development Lead



**Jonathan
Cranmer**
Development Lead



Logistics

Should last for approximately about 60 min

Polling via [slido.com](https://www.slido.com) #NGG7

All callers will be placed on mute

Please turn your camera off as to save bandwidth

We will circulate the slides and a recording of this webinar

Today's Agenda

Introduction



H₂

Hydrogen Project

Gas Markets Plan



Balancing & C.A.R. Project

Audience Poll



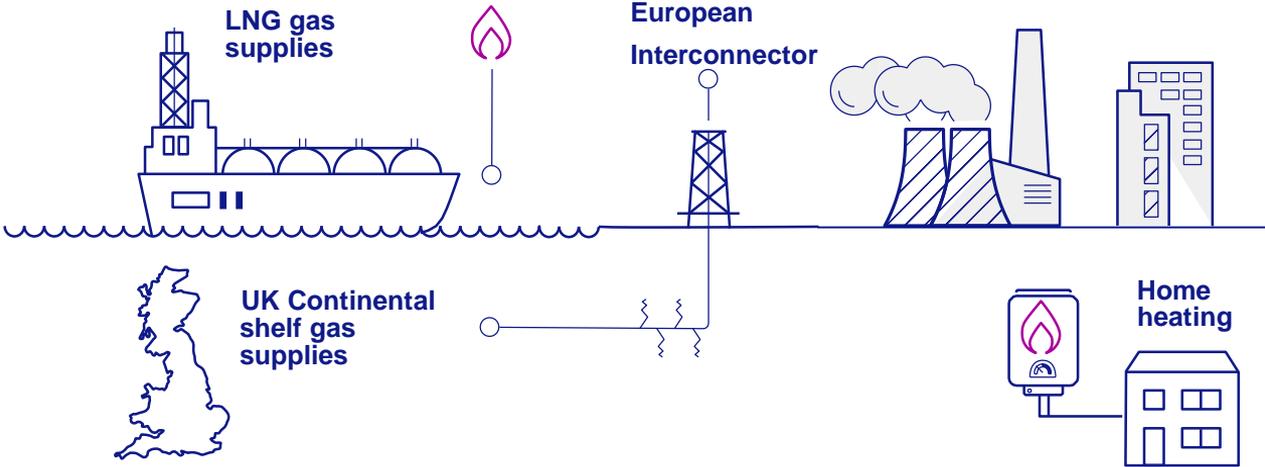
Q&A Session

Gas Quality Project

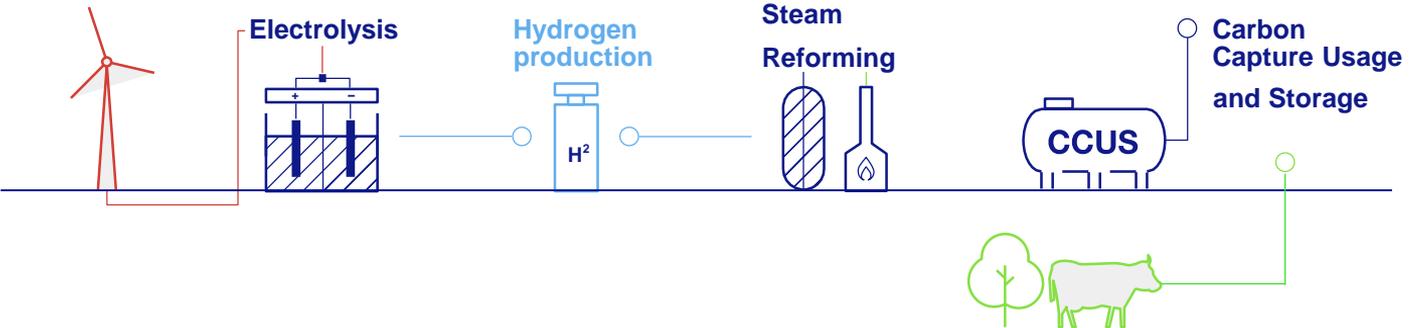


Closing Remarks

Gas will be a big part of the energy transition



The extent of future decarbonised and renewable gases is **unclear**



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The Gas Markets Plan (GMaP)

Our First Year Reflections and Vision

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GMaP programme aim:

Working with the industry,
GMaP *steps* towards the gas
market of the future



Our First Year



Launch document



FOG forum



Projects



Website

Our Steering Group

*Made up from the gas supply chain;
means we can ensure that we work on
the issues that are most important to
the whole industry*



Our Steering Group - Members



Department for
Business, Energy
& Industrial Strategy

ofgem

storengy



regeno
transforming energy

Cadent

Your Gas Network

Northern
Gas Networks

UK:
100



E3G

nationalgrid

CIA
Chemical
Industries
Association

DNV·GL

OIL&GAS^{UK}



Energy
UK

ITM POWER
Energy Storage | Clean Fuel



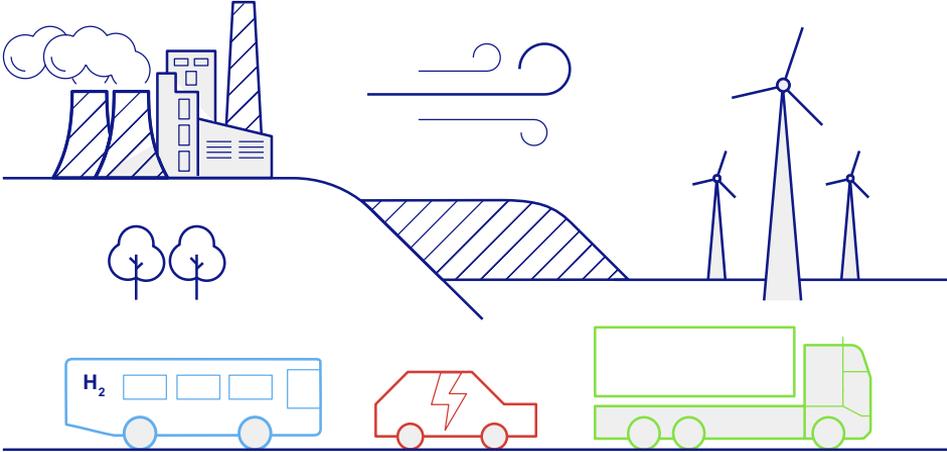
AFRY
AF PÖYRY

Interconnector

JM Johnson Matthey
Inspiring science, enhancing life

2021 – What is important to focus on?

Between now and the end of the year we will be developing our 2021 plan



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- Have your say.
- If it matters to you,
- It matters to us!
- Help shape our Future!
- Bring Energy to Life.

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Gas Quality Gas Markets Plan (GMaP)

*Implementing the
Proposed Gas
Quality Standards
project*

national**grid**



Project Rationale



Low carbon gases can help meet legally binding policy targets in a cost-effective manner.



Only through the updating of contractual network entry agreements can any updated gas quality ranges be legally accessed.



Facilitating this transition will need changes to legislation to remove restrictions on the types of gas that can enter the UK networks.



The Uniform Network Code (UNC) has rules governing how gas quality ranges within a network entry agreement can be changed.

Will these rules still meet the needs of the industry in the future?

Project Approach



Published a detailed project scoping document based on stakeholder feedback



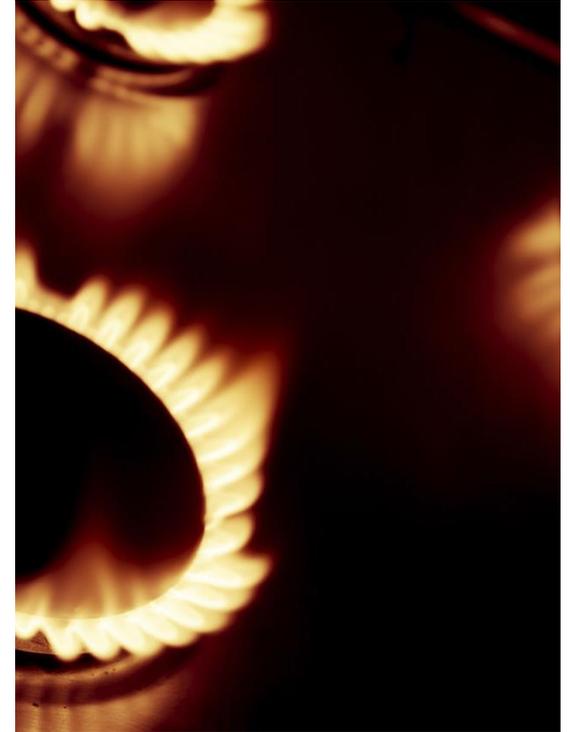
Engaged extensively through a dedicated work group of external stakeholders



Completed situation analysis and optioneering stages



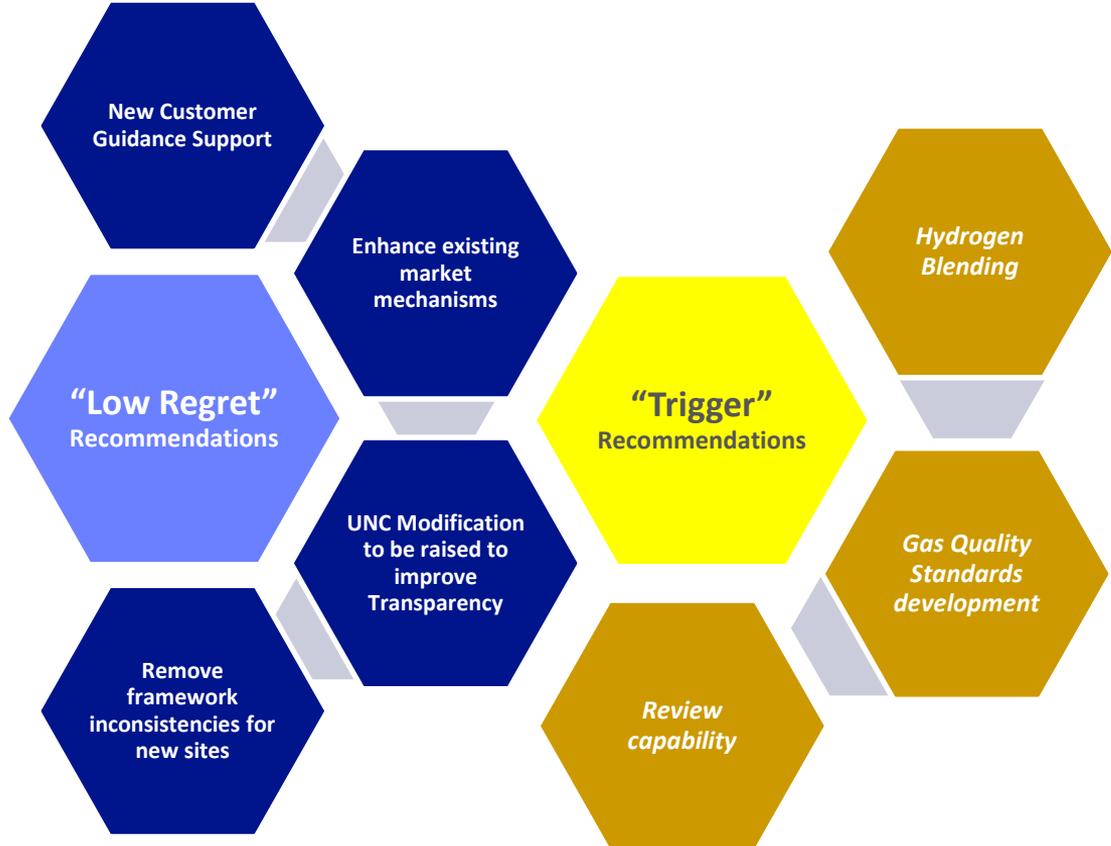
Created and refined project recommendations, delivering tangible market benefits



Project Recommendations

The project is looking to deliver market and process improvements based on stakeholder engagement.

Whilst we need to recognise that there is still a lot of uncertainty and additional actions will be required in a certain circumstances



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Hydrogen Gas Markets Plan (GMaP)

*Exploring the impacts of
a hydrogen transition on
our commercial frameworks*

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Introducing the Hydrogen Gas Markets Plan



Hydrogen, alongside other low carbon gases, is expected to play a significant role in the decarbonisation of UK energy.

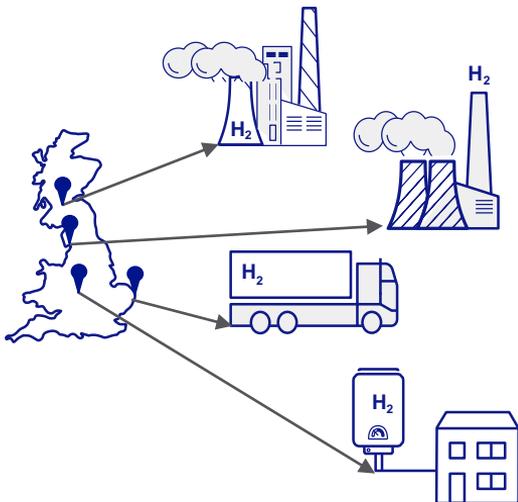
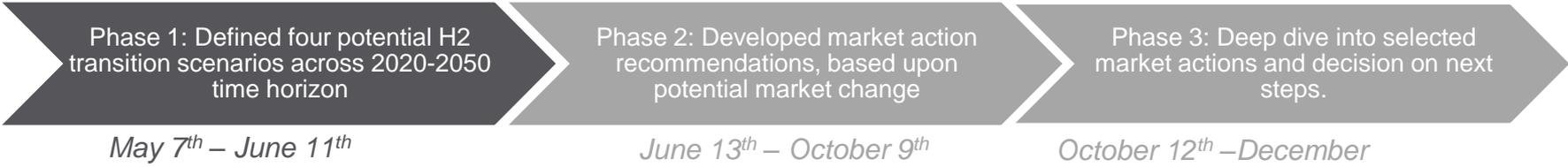


The H2 GMaP aims to outline future gas market change, to indicate to industry participants how to plan for a potential H2 transition.



A series of cross-industry working groups discuss progress and refine the outputs of the H2 GMaP project.

Hydrogen Gas Markets Plan (GMaP):



Phase 1: Defined four potential H2 transition scenarios across 2020-2050 time horizon

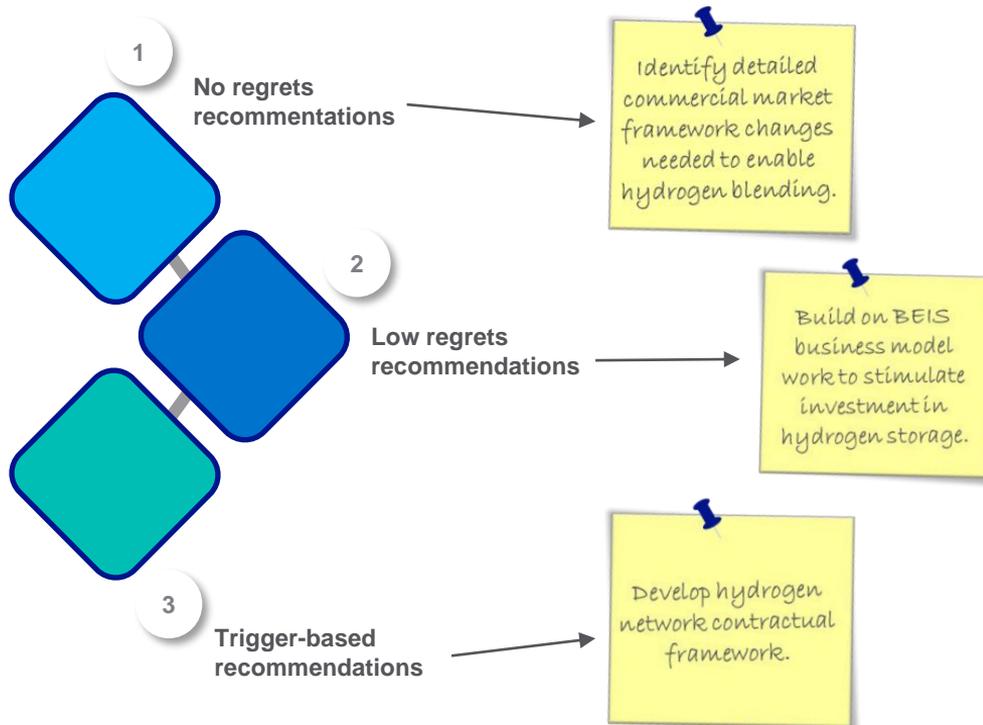
May 7th – June 11th

Phase 2: Developed market action recommendations, based upon potential market change

June 13th – October 9th

Phase 3: Deep dive into selected market actions and decision on next steps.

October 12th – December



Phase 1: Defined four potential H2 transition scenarios across 2020-2050 time horizon

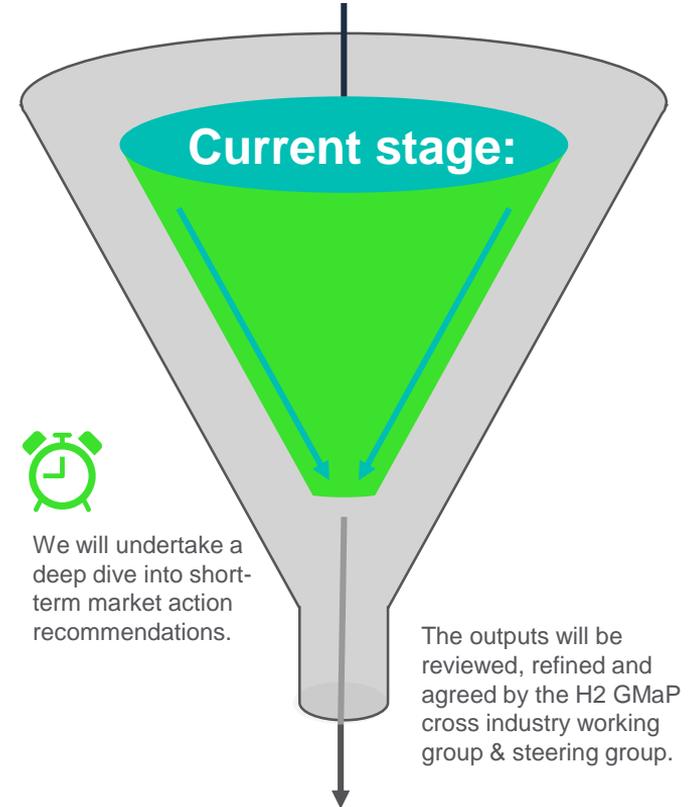
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Phase 2: Developed market action recommendations, based upon potential market change

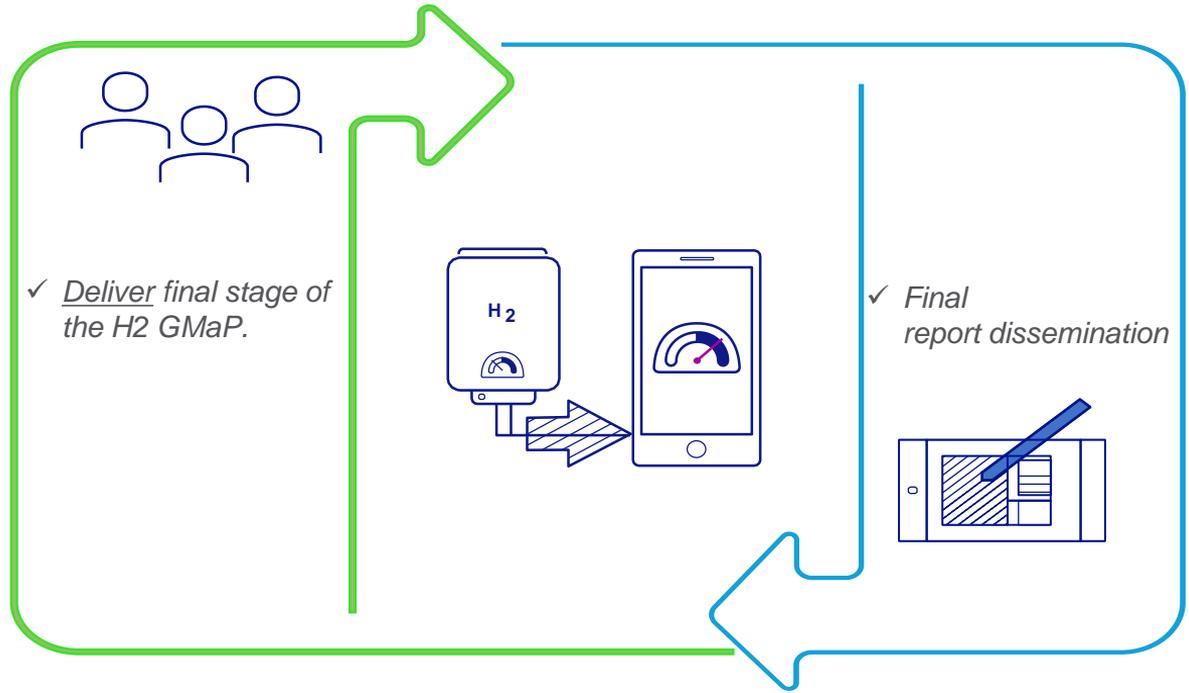
June 13th – October 9th

Phase 3: Deep dive into selected market actions and decision on next steps.

October 12th – December



Next Steps for the Hydrogen GMaP project:




To find out more information on the Hydrogen Gas Markets Plan, please check out our [website](#) or reach out to susannah.ferris@nationalgrid.com

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**Balancing &
Capacity Access
Gas Markets Plan
(GMaP)**

*Exploring
Regimes for
Tomorrows World*

national**grid**



Project Rationale:

Balancing and Capacity arrangements ensure that the UK's gas supply and demands are maintained.

By understanding these changing dynamics we can effectively assess current arrangements.

Changes in the dynamics of the UK's energy landscape are presenting new challenges.

It is important to consider the whole energy landscape when assessing future needs.

What we've done:

Engaged extensively through bi-lateral meetings.



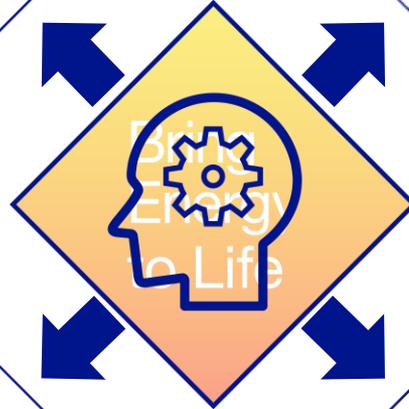
Debated and agreed upon the likely changes to the UK Energy landscape.



Formed a dedicated working group of external stakeholders and SME's.



Identified key areas for further investigation and understanding.



Coming Next:



Expanding the representation of the external stakeholder and SME group.



Further research and engagement into key areas of interest.



Further workshop activity to understand how the impacts from change could be addressed.



Output of straw-person regime constructs.

Moving Forwards

Gas Transmission

Q&A

Helen Campbell
Neil Rowley
Bill Goode
Susannah Ferris
Jonathan Cranmer

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Closing Remarks



Steering Group Meeting – Jan 2021



Final Reports: Gas Quality & Hydrogen



[Future of Gas Website](#)



Investigations: Balancing & Capacity Access

Keep the conversation going!



Neil Rowley

Gas Market Development Manager

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Bill Goode

Senior Development Lead - Gas

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Susannah Ferris

Development Lead - Gas

Susannah.Ferris@nationalgrid.com



Jonathan Cranmer

Development Lead - Gas

Jonathan.Cranmer@nationalgrid.com

Thank you for joining us today:

Digital strategy and information provision	Mon 02 nd Nov @ 14.00 – 15.00	
Shaping the Innovation Strategy for RII0-2	Tue 03 rd Nov @ 14.00 – 15.00	
Operating the network	Thu 05 th Nov @ 10.30 – 11.30	
Building skills today for a Net Zero	Mon 09 th Nov @ 13.30 – 14.30	
Reducing methane emissions: opportunities and barriers	Thu 12 th Nov @ 11.00 – 12.00	
Gas Markets Action Plan (GMaP)	Mon 16 th Nov @ 10.00 – 11.00	
Mapping our hydrogen transition	Wed 18 th Nov @ 14.00 – 15.00	Register here
Net Zero construction 2025/26 roadmap	Thu 19 th Nov @ 10.00 – 11.00	Register here
Heating our homes in a Net Zero future	Fri 20 th Nov @ 9.00 – 10.00	Register here
Planning the network	Mon 23 rd Nov @ 14.00 – 15.00	Register here
HyNTS FutureGrid	Tue 1 st Dec @ 14.00 – 15.00	Register here

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