Gas Advisory Council

First meeting

30th January 2025 – London

NESO
National Energy System Operator

Agenda

Time	Slot	
9.30-9.45	Opening Remarks	Rebecca Beresford
9.45-10.45	Introductions to members	Vicki Mustard
10.45-11.00	Break	
11.00-11.30	GAC Foundations (Purpose, Vision, and Terms of Reference)	Vicki Mustard
11.30-12.00	WEMS Approach	Suki Ferris
12.00-12.30	Lunch	
12.30-1.30	UK Gas Market Challenges	All
1.30-2.00	GAC Project Brief	All
2.00-2.15	Break	
2.15-4.15	Project Ideation and Prioritisation	All
4.15-4.30	Close and Next Steps	Vicki Mustard

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Welcome

The National Energy System Operator

The UK's 2023 Energy Act set the legislative framework for an independent system planner and operator to be set up to help accelerate Great Britain's energy transition, leading to the establishment of the National Energy System Operator (NESO).

Our Primary Duties

NESO will promote the following three objectives:

Net Zero
Enabling the Government to deliver on its legally binding emissions targets.

Efficiency & Economy
Promoting efficient, co-ordinated and economical systems for electricity and gas.

Security of Supply
Ensuring security of supply for current and future customers of electricity and gases.

Our Secondary Duties

NESO will also have regard to:

Facilitating Competition
Creating and maintaining competitive energy markets and networks.

Consumer Impacts
Understanding what changes mean for consumers.

Whole System Impacts
Understanding linkages across systems.

Facilitating Innovation
Creating an environment that enables others to help solve energy challenges.

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Our Purpose, Vision And Values

Our purpose is to forge the path to a sustainable future for everyone.

Our vision is a future where everyone has access to reliable, clean and affordable energy; our work will be a catalyst for change across the global community.

Our values are what define us, setting the foundation for our purpose and guiding us as we move towards achieving our vision.

Accelerate Progress
We deliver better outcomes at pace when we take accountability, are courageous and progress the bigger picture.

Be Curious
We achieve more when we demonstrate a growth mindset, being curious, asking questions beyond and within our organisation to develop, learn and innovate.

Build Trust
We build trust when we listen to and understand the needs of our colleagues and customers, are transparent with our actions and deliver on our commitments.

Create Belonging
We perform at our best when we can be our true selves, embrace diversity and are truly inclusive.

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We need your expertise

We are working to deliver **competitive**, **coordinated** and **coherent** energy markets that result in the most **cost-efficient energy system** and give us the tools and services to **operate in a low-carbon energy landscape**. To do this, we:

Anticipate the whole energy system's future **requirements**

Collaborate internally & externally to implement market, services, and product changes that facilitate the transition to a **secure, affordable, low-carbon energy system in line with policy**

Ensure industry codes, regulations and **frameworks** are future-proofed and provide a pathways for customers to drive change

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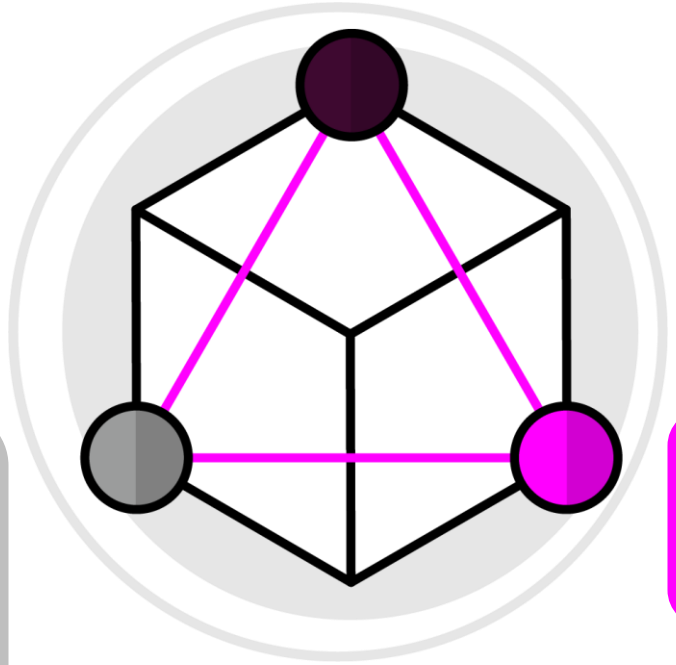
Markets at NESO

We **aim** to design market arrangements that facilitate **security of supply at the lowest sustainable cost** for consumers **while enabling the transition to net zero.**



We are working to deliver **competitive**, **coordinated** and **coherent** energy markets that result in the most **cost-efficient energy system** and give us the tools and services to **operate in a low-carbon energy landscape**.

We drive **reforms across electricity and gas markets** and **collaborating across the industry** to shape markets of tomorrow.

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Interactions between NESO Market Engagement

	Whole Energy Markets Forum	Gas Advisory Council (GAC)	Markets Advisory Council (MAC)
Previous nomenclature	Markets Forum	Future of Gas Steering Group	Markets Advisory Council
Format	Open events to the energy industry	Invite only	Invite only
Focus area	Cross market forum reflecting the priorities of the energy industry, NESO's role, and NESO's market activities. Understanding stakeholder views on how we are designing and developing markets of today and tomorrow.	Action based advisory council exploring strategic change across different molecules to transition the gas sector.	Council providing advice to NESO on pertinent electricity market topics, such as new policy & market design and growth of flexibility.
Outputs	Information sharing and opportunity for discussions and feedback on NESO's market development and design.	Targeted recommendations in the form of research papers, recommendations for policy/legislation or code changes. Input to the Gas Future Market Plan	Group discussion including suggestions for how NESO can effectively design, prioritise and implement change across electricity markets.

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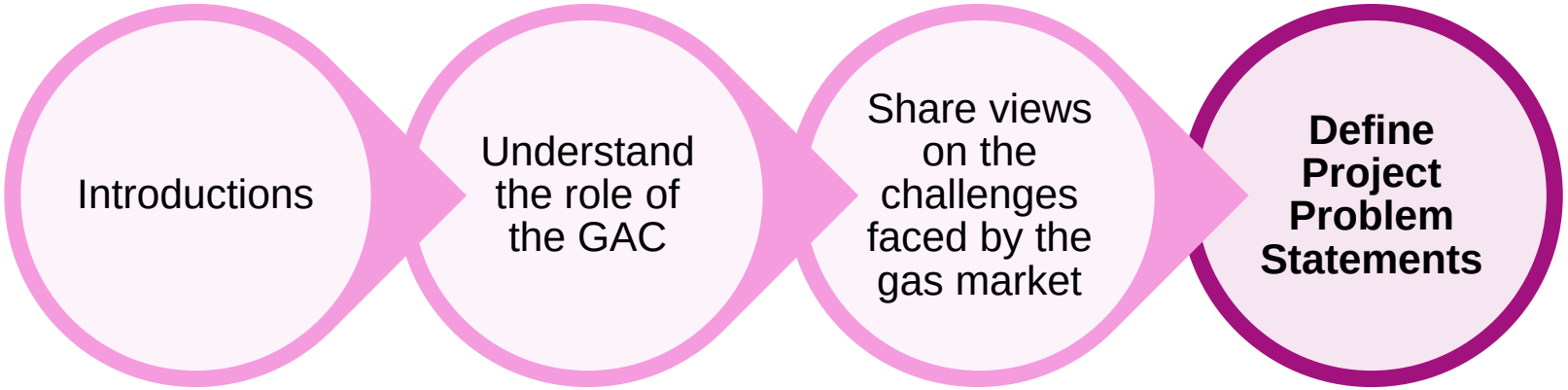
Objective of today's meeting



Introductions

Members of the GAC and the NESO Tech Sec Team

GAC Members Roundtable

Consumers

- Industrial Consumers
- Domestic Consumers
- Generation

Transport and Storage

- Storage Providers
- Transmission Networks
- Distribution Networks
- Independent Gas Transporters
- Interconnectors

Shippers and Suppliers

- Large Shippers / Suppliers
- Small – Medium Shippers / Suppliers
- Industrial Shippers / Suppliers

Evolving Markets

- Hydrogen Markets
- Carbon Capture Utilization and Storage
- Biomethane Markets
- LNG Markets

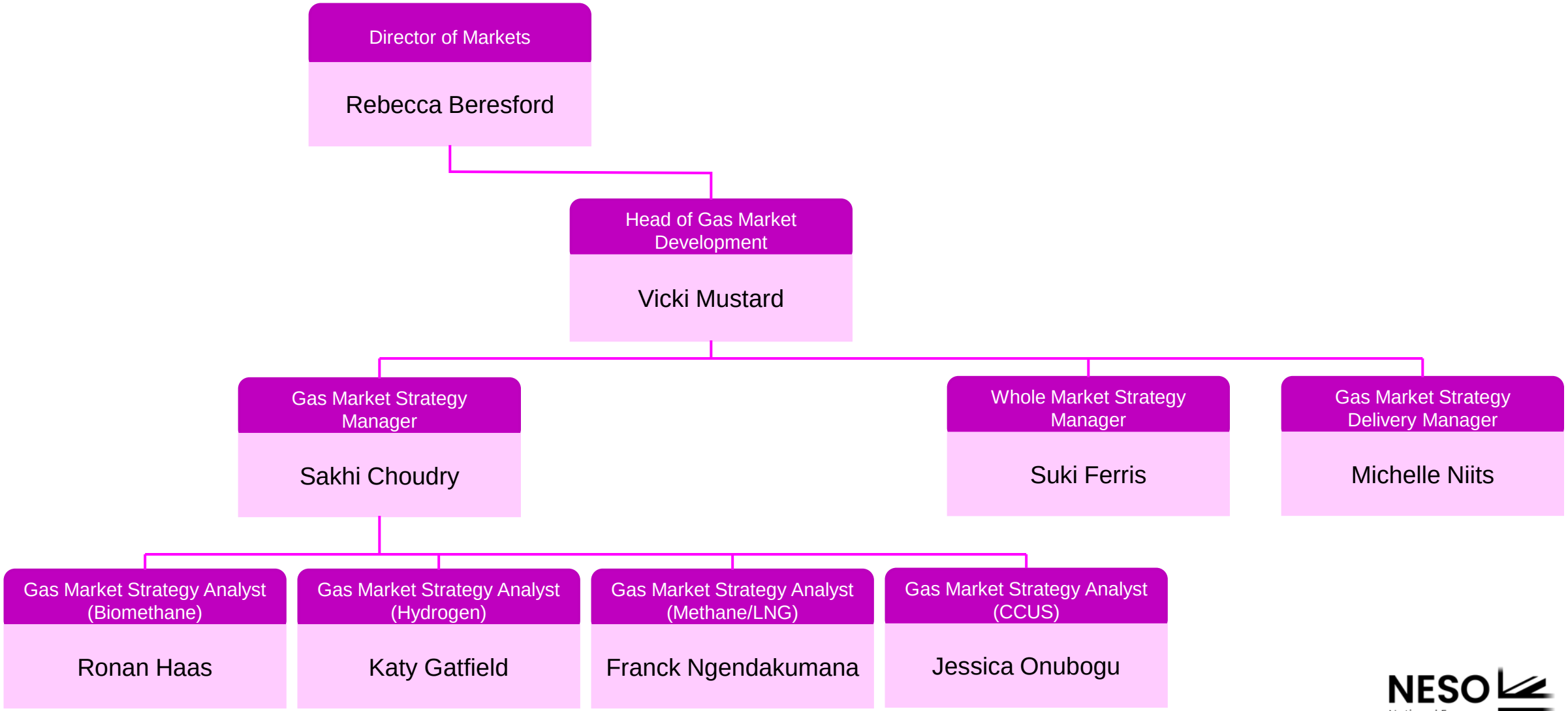
Governance and Regulation

- Government
- Regulator
- Code Administration
- Billing, Settlement and Market Data

Cross Market

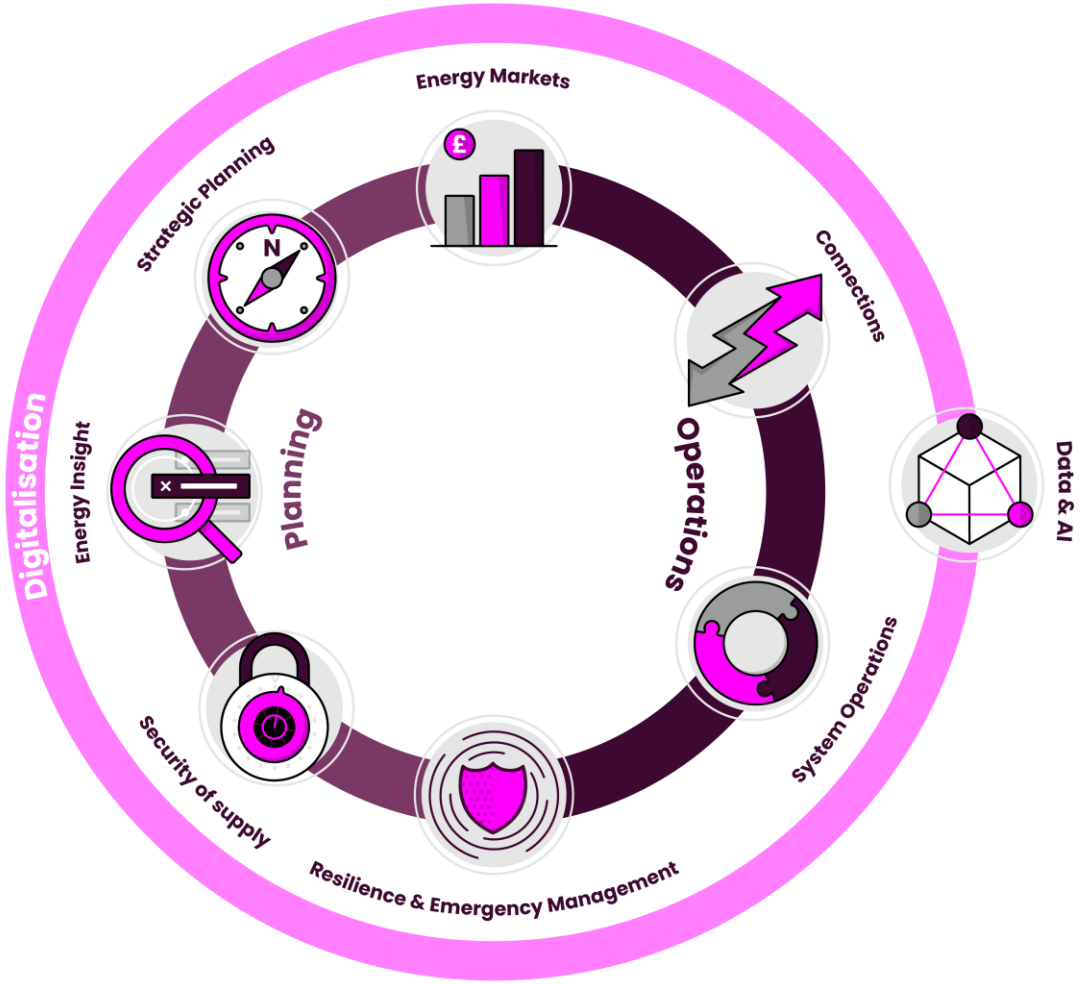
- Skills and Jobs
- Climate Change Advisory
- Academia

The NESO Gas Market Strategy Team



Collaborative Synergies

The Gas Market Strategy Team is working closely with other NESO Teams to benefit from their insights.



GAC Foundations

Purpose, Vision and Terms of Reference

Gas Advisory Council Purpose

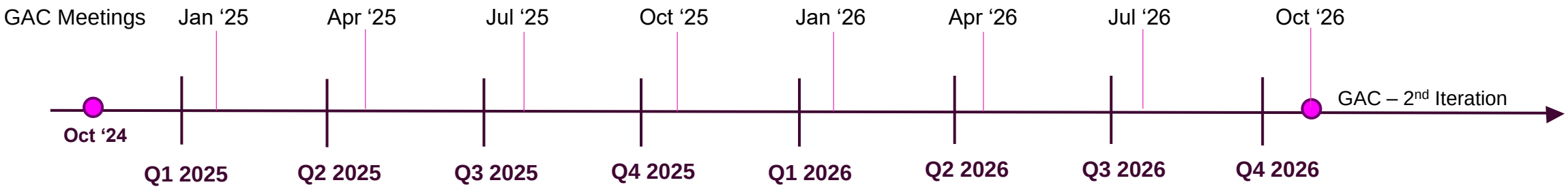
An **action based** advisory council that can provide strategic outputs on the future of gas markets to ensure they are affordable for consumers, fair and considered across different molecular gases as well as sustainable. The group will act as a **focal point** across industry, decision makers, stakeholders and academics within the gas market.

The GAC will **look across molecules** (methane, hydrogen, carbon, biomethane and LNG markets) and deliver **targeted recommendations** in the form of potential further research papers, potential changes to codes or recommendations for policy/legislation changes.

To support NESO in fulfilling its Gas Licence Obligations (Gas System Planner Licence Condition C7.4).

Potentially feed into advisory requests that NESO receive.

GAC Cadence and Look Ahead



GAC 1st Term

- Gas Advisory Council Projects
- Advisory Function
- Development of the gas Future Markets Plan

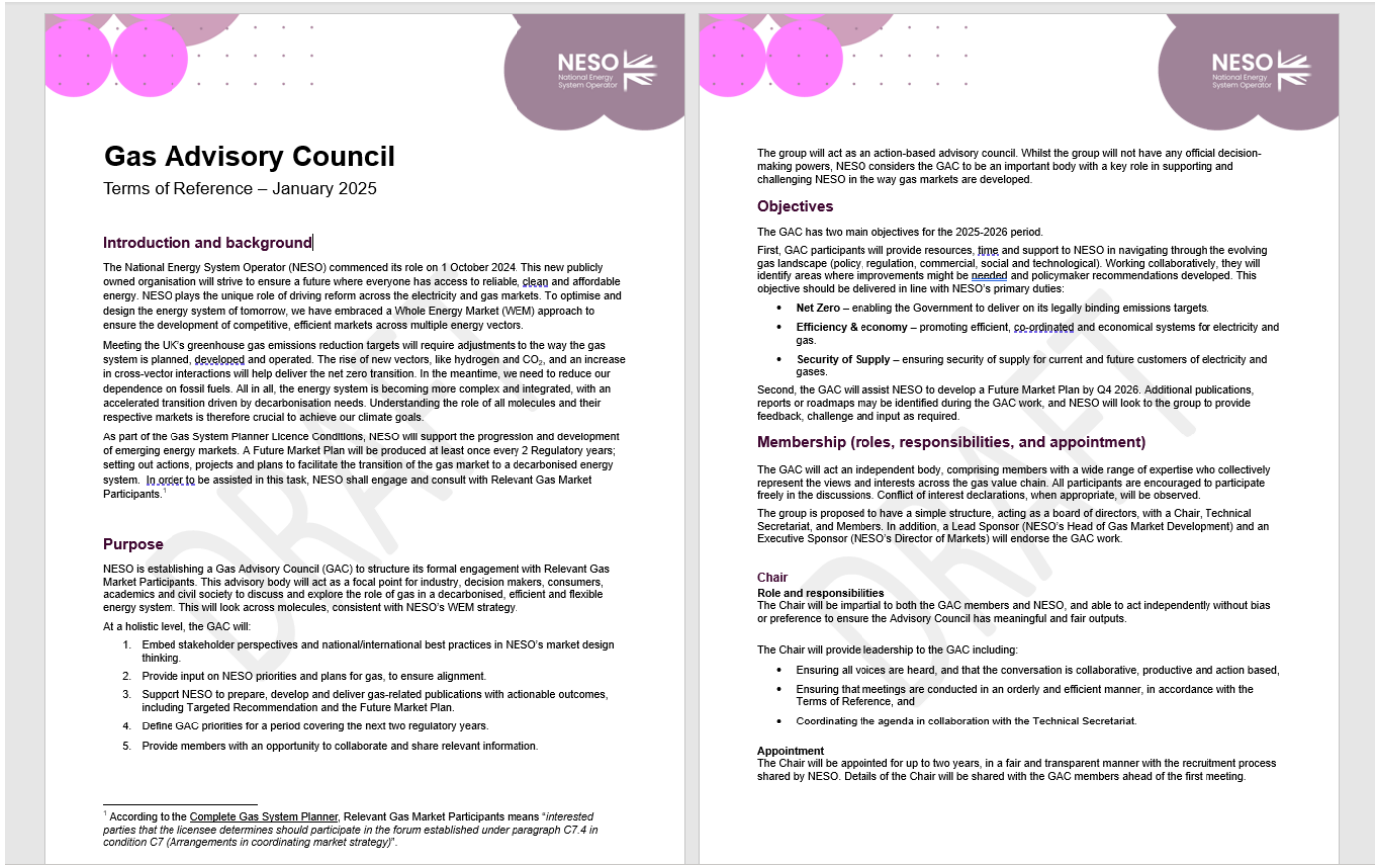
Publication of gas FMP

Membership term renewal

ToR Review

Terms of Reference

As circulated in the pre-read material, hard copies are also available. Formal acceptance of the Terms of Reference will hold members to its contents for the 2025-2026 period. The Terms of Reference will be reviewed in October 2026.



Gas Advisory Council

Terms of Reference – January 2025

Introduction and background

The National Energy System Operator (NESO) commenced its role on 1 October 2024. This new publicly owned organisation will strive to ensure a future where everyone has access to reliable, clean and affordable energy. NESO plays the unique role of driving reform across the electricity and gas markets. To optimise and design the energy system of tomorrow, we have embraced a Whole Energy Market (WEM) approach to ensure the development of competitive, efficient markets across multiple energy vectors.

Meeting the UK's greenhouse gas emissions reduction targets will require adjustments to the way the gas system is planned, developed and operated. The rise of new vectors, like hydrogen and CO_2, and an increase in cross-vector interactions will help deliver the net zero transition. In the meantime, we need to reduce our dependence on fossil fuels. All in all, the energy system is becoming more complex and integrated, with an accelerated transition driven by decarbonisation needs. Understanding the role of all molecules and their respective markets is therefore crucial to achieve our climate goals.

As part of the Gas System Planner Licence Conditions, NESO will support the progression and development of emerging energy markets. A Future Market Plan will be produced at least once every 2 Regulatory years; setting out actions, projects and plans to facilitate the transition of the gas market to a decarbonised energy system. In order to be assisted in this task, NESO shall engage and consult with Relevant Gas Market Participants.[1]

Purpose

NESO is establishing a Gas Advisory Council (GAC) to structure its formal engagement with Relevant Gas Market Participants. This advisory body will act as a focal point for industry, decision makers, consumers, academics and civil society to discuss and explore the role of gas in a decarbonised, efficient and flexible energy system. This will look across molecules, consistent with NESO's WEM strategy.

At a holistic level, the GAC will:

1. Embed stakeholder perspectives and national/international best practices in NESO's market design thinking.
2. Provide input on NESO priorities and plans for gas, to ensure alignment.
3. Support NESO to prepare, develop and deliver gas-related publications with actionable outcomes, including Targeted Recommendation and the Future Market Plan.
4. Define GAC priorities for a period covering the next two regulatory years.
5. Provide members with an opportunity to collaborate and share relevant information.

[1] According to the Complete Gas System Planner, Relevant Gas Market Participants means "*interested parties that the licensee determines should participate in the forum established under paragraph C7.4 in condition C7 (Arrangements in coordinating market strategy)*".

The group will act as an action-based advisory council. Whilst the group will not have any official decision-making powers, NESO considers the GAC to be an important body with a key role in supporting and challenging NESO in the way gas markets are developed.

Objectives

The GAC has two main objectives for the 2025-2026 period.

First, GAC participants will provide resources, time and support to NESO in navigating through the evolving gas landscape (policy, regulation, commercial, social and technological). Working collaboratively, they will identify areas where improvements might be needed and policymaker recommendations developed. This objective should be delivered in line with NESO's primary duties:

- **Net Zero** – enabling the Government to deliver on its legally binding emissions targets.
- **Efficiency & economy** – promoting efficient, co-ordinated and economical systems for electricity and gas.
- **Security of Supply** – ensuring security of supply for current and future customers of electricity and gases.

Second, the GAC will assist NESO to develop a Future Market Plan by Q4 2026. Additional publications, reports or roadmaps may be identified during the GAC work, and NESO will look to the group to provide feedback, challenge and input as required.

Membership (roles, responsibilities, and appointment)

The GAC will act an independent body, comprising members with a wide range of expertise who collectively represent the views and interests across the gas value chain. All participants are encouraged to participate freely in the discussions. Conflict of interest declarations, when appropriate, will be observed.

The group is proposed to have a simple structure, acting as a board of directors, with a Chair, Technical Secretariat, and Members. In addition, a Lead Sponsor (NESO's Head of Gas Market Development) and an Executive Sponsor (NESO's Director of Markets) will endorse the GAC work.

Chair

Role and responsibilities

The Chair will be impartial to both the GAC members and NESO, and able to act independently without bias or preference to ensure the Advisory Council has meaningful and fair outputs.

The Chair will provide leadership to the GAC including:

- Ensuring all voices are heard, and that the conversation is collaborative, productive and action based,
- Ensuring that meetings are conducted in an orderly and efficient manner, in accordance with the Terms of Reference, and
- Coordinating the agenda in collaboration with the Technical Secretariat.

Appointment

The Chair will be appointed for up to two years, in a fair and transparent manner with the recruitment process shared by NESO. Details of the Chair will be shared with the GAC members ahead of the first meeting.

Whole Energy Markets

Introduction | NESO's strategic remit, following the 2023 Energy Act, includes Whole Energy Market Strategy as part of its advisory role

Remit of the National Energy System Operator (NESO)

2023 Energy Act

1. NESO continues to function as the **system operator** for electricity
2. NESO acts as a **system planner** providing strategic direction for electricity, gas and future systems[1]
3. NESO serves as an **independent advisor**, providing analysis and information to Government and Ofgem

NESO's Whole Energy Market Strategy (WEMS)

A whole energy market approach is needed to ensure

- A clean, secure and affordable energy future for Great Britain (GB)
- Development of competitive, efficient markets across multiple energy vectors
- Improved coordination between vectors, by addressing inefficiencies in existing market design

NESO builds upon ongoing work when developing whole energy thinking

Future Energy Scenarios (FES)

Review of Electricity Market Arrangements (REMA)

Clean Power 2030

Strategic Energy Planning

Comprises:
- Strategic Spatial Energy Plan (SSEP)
- Regional Energy Strategic Planner (RESP)
- Centralised Strategic Network Plan (CSNP)

1. e.g., Hydrogen etc.

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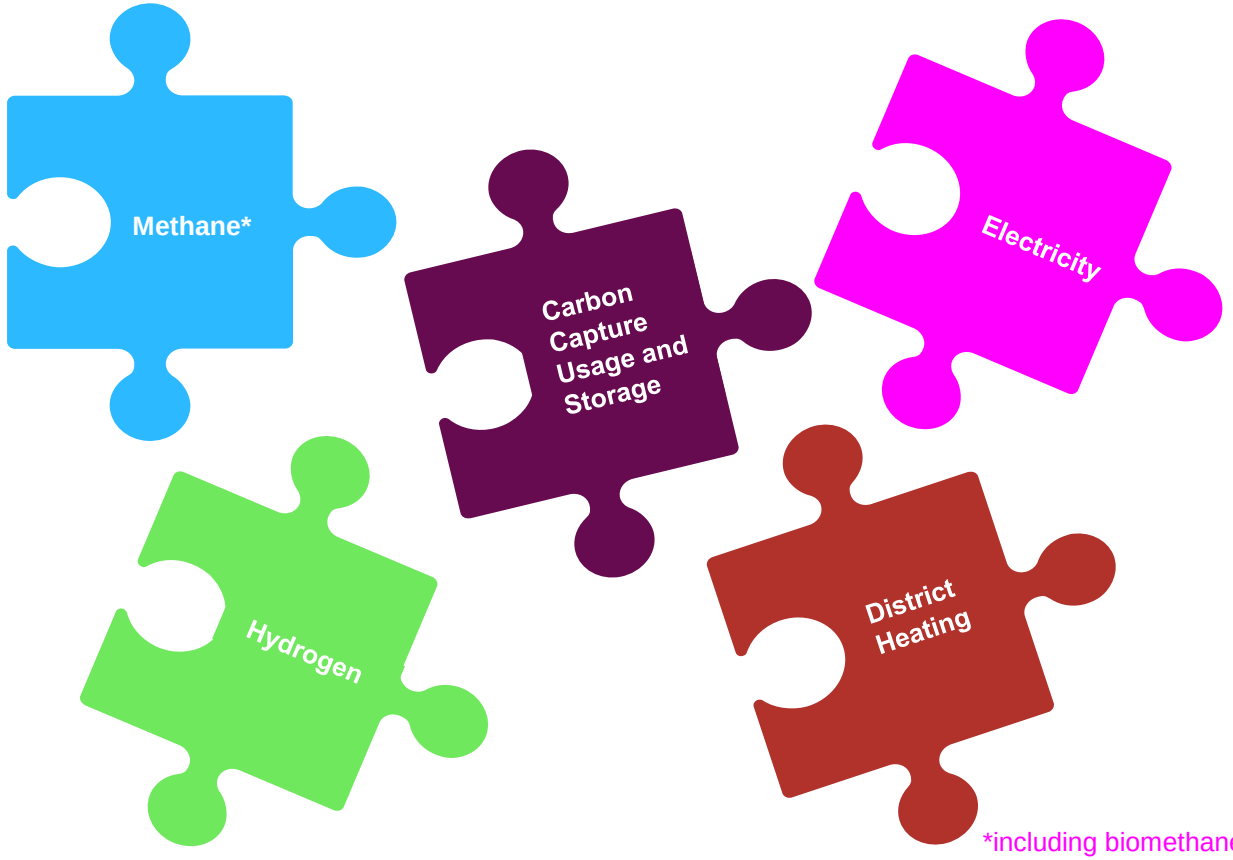
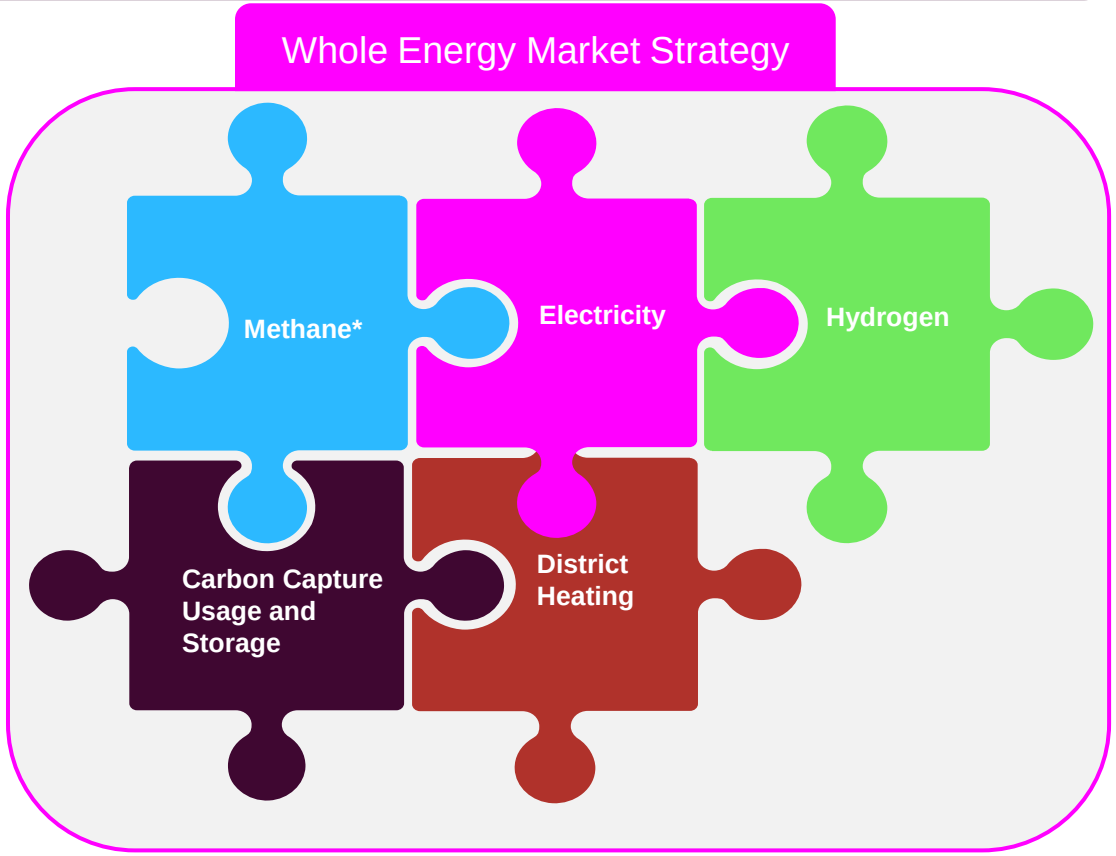
Purpose | The new role of NESO includes exploring how energy markets can work better together

Currently, energy markets are designed independently of each other, in a fragmented approach



*including biomethane

Transitioning to a clean energy system requires an exploration of how markets can work better together to support decarbonisation in an affordable and secure way



For the purpose of this project, our scope includes 5 ‘vectors’, which we define as distinct energy / waste carrying networks including: Electricity, Natural Gas (methane / biomethane), Networked Heat (i.e., district heating), Hydrogen, Networked Carbon (i.e., Carbon Capture Usage and Storage)
Our current scope excludes the transport sector amongst others, where future phases may explore scope expansion.

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We developed an analytical framework to identify & prioritise focus areas that could benefit from greater whole energy market coordination

Market Design Categories: We developed an overview of the components of as-is market design across the 5 vectors in our scope using the below categories:

Economic Regulation

Structure of the energy market across vectors, value chains and market participants

E.g. Licensed activities, Codes, Standards

Investment policy

Market interventions employed to achieve specific policy objectives

E.g. Decarbonisation support mechanisms

Operational market design

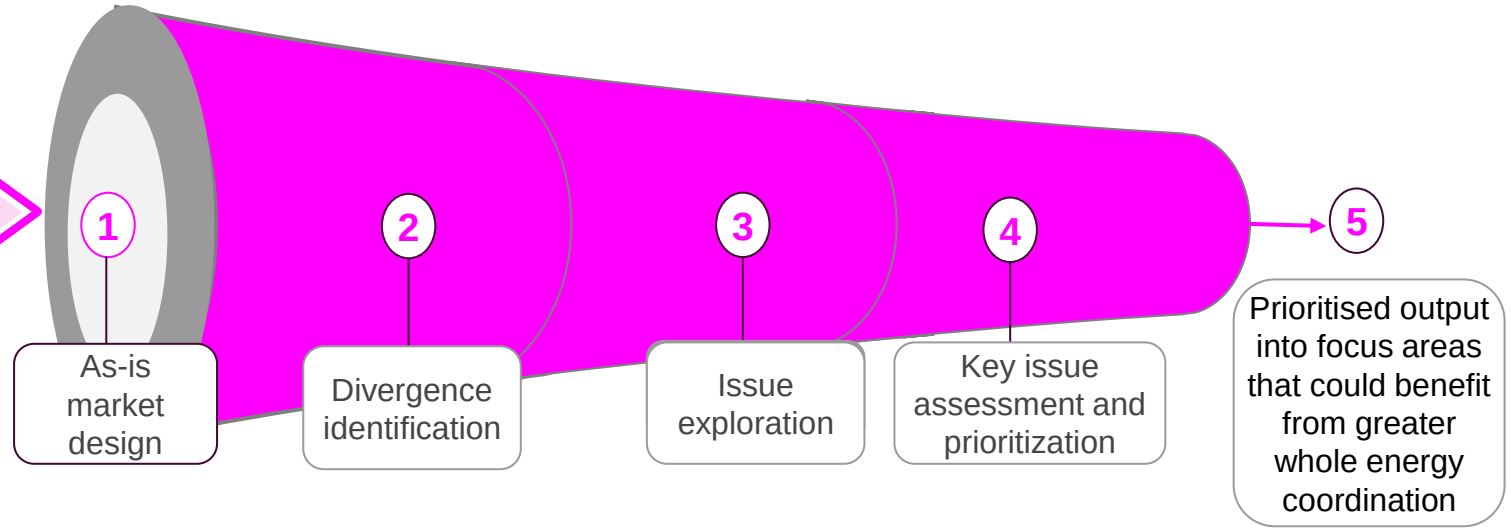
The structure of wholesale and short-term operational energy markets to match physical supply and demand

E.g. Energy balancing mechanism design, ancillary services

Cost allocation

Cost recovery for networks and investment policy

E.g. Investment policy cost allocation, network cost allocation



1. Market design categories were used to develop comprehensive as-is market representations (across a total of 122 sub-category market design elements for each of the five vectors).
2. Comparing the as-is market representations we identified where there are differences (divergences).
3. We then explored potential issues as a result of these market design divergences.
4. We then considered the urgency and severity of the issues, assessing the urgency through their timescale & irreversibility, and severity through risk materiality & probability.

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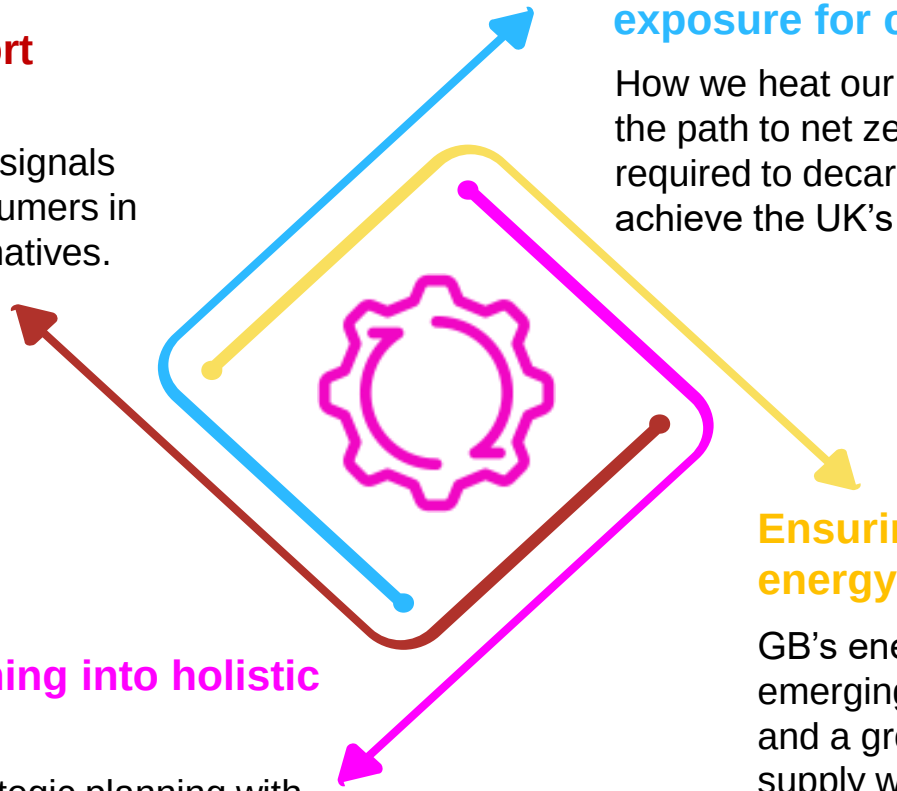
Focus areas | Based on our analysis and stakeholder insight, four pillars encapsulate the potential for improved coordination across energy markets

Improving carbon signals to support decarbonisation

There is a need for coordination of carbon signals for a fair energy transition, to support consumers in the transition to lower carbon energy alternatives.



Unlocking clean heating by minimising cost exposure for consumers

How we heat our homes is one of the biggest challenges we face on the path to net zero. The pace and scale of new heating technology required to decarbonise heat requires co-ordinated market signals to achieve the UK's climate change targets.

Integrating greater strategic planning into holistic market design

There is a need to coordinate greater strategic planning with market signals and investment policy to support the UK's net-zero transition.

Ensuring energy security in a more complex energy system

GB's energy landscape is increasing in complexity, with emerging new low carbon energy markets and technologies, and a growing role for energy consumers to balance energy supply with demand. This calls for enhanced coordination across markets to secure the overall energy system.

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Case study | Long-term incentives across vectors could support overall energy security

Market design divergence

	Investment policy	Supply adequacy	Support mechanisms
Electricity	• Yes • Capacity Market*		
Natural Gas	• No mechanisms exist		
Hydrogen	• To be determined		
Networked Heat	• No mechanisms exist		
Networked Carbon	• Not applicable, carbon is a waste product		

Description of the market design divergence:

Electricity is the only vector that has an investment policy mechanism to provide a long-term incentive to support investment in energy supply assets to contribute to security of supply.

*The Capacity Market was introduced by the UK government and launched in 2014 to manage security of electricity supply by ensuring adequate investment into reliable electricity capacity. The scheme operates by providing Capacity Providers with steady, monthly payment to ensure there is enough capacity to meet demand. The agreement length available is dependent on the type of unit – new build can secure 15-year agreements.

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Case study | Long-term incentives across vectors could support overall energy security

Issues driven by market design divergence:

- Will scarcity pricing be sufficient to ensure SoS across vectors?
- Reduced investor confidence into new assets to contribute to SoS across vectors
- Increased cost exposure to consumers to ensure overall energy security.

Whole energy coordination opportunity:

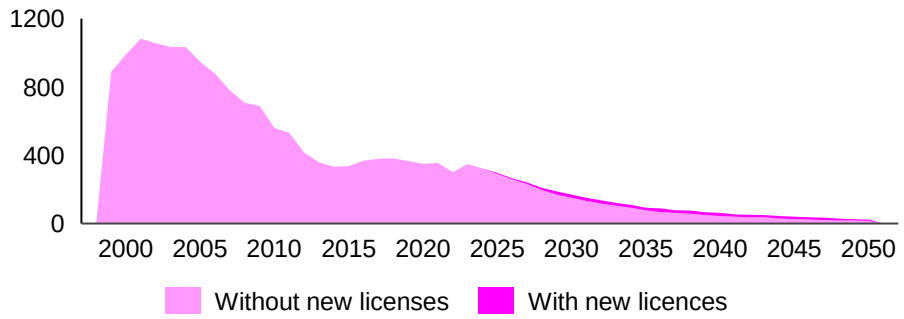
Introduction of incentive mechanisms across vectors to support overall energy system security.

Case study | Long-term incentives across vectors could support overall energy security

Illustration of case study in current energy landscape:

Natural gas will continue to play a critical role in our energy system for decades to come. To date, the market has and continues to deliver effectively, wholesale prices have provided adequate signals to support SoS. However, the decline of UKCS production could generate the need to consider further measures to ensure security of supply, especially when considering the integrated nature of natural gas into overall energy security.

UK North Sea natural gas production over time



Source: North Sea Transition Authority

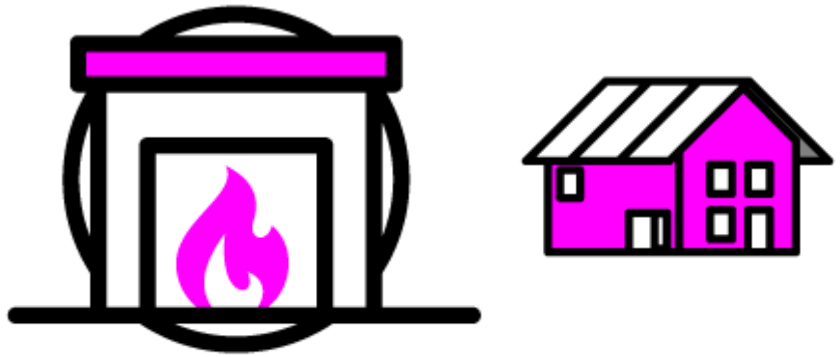
Whole energy illustrative opportunities

- Gas storage diversity
- Evolution of gas fired power plants business case

Case study | Long-term incentives across vectors could support overall energy security

Illustration of case study in current energy landscape:

District heat provides just over 2% of our heating requirements today, Government targets set to increase this to 20% by 2050. Ofgem has been appointed as the regulator for heat networks, and DESNZ is currently establishing heat network zones across the UK.



Heat

Whole energy illustrative opportunities

- Thermal storage (large + small scale) for networked heat / domestic heat for energy security purposes
  - Opportunity to provide flexibility services too.

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Case study | Coordination of connections policy across vectors could lead to more efficient outcomes in how low carbon energy is produced and transported

Market design divergence

Market fundamentals	
Level of competition in regulated activity	
Connection process	
Electricity	• Prioritisation based on alignment of projects readiness (project milestones incl. secured consents, land rights and agreed construction plan) as well as alignment with strategic plan (initially CP2030).
Natural Gas	• First come first served
Hydrogen	• To be confirmed
Networked Heat	• N/A (as networked heat does not operate at transmission level)
Networked Carbon	• First come first served

Issues driven by market design divergence:

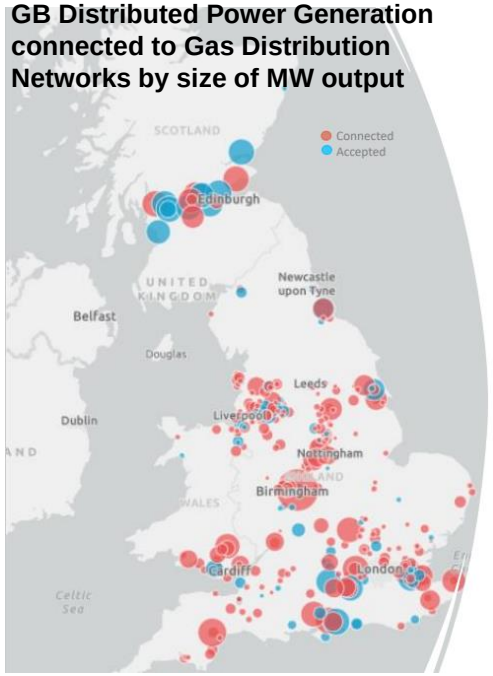
Discrepancies in connection processes across vectors could result in inefficient incentives to produce, transport or consume energy in one or more vector(s), where it may have been more efficient to connect to another vector's infrastructure.

Case study | Coordination of connections policy across vectors could lead to more efficient outcomes in how low carbon energy is produced and transported

Illustration of case study in current energy landscape:

The GB electricity connections queue is over 750 Gigawatts (GW), an amount of electricity generation that is over four times more than what is predicted to achieve net zero by 2050 (NESO modelling).

GB Distributed Power Generation connected to Gas Distribution Networks by size of MW output



- Long delays in electricity transmission connections cause parties to seek alternatives.
- Data centre developers may use 'islanded' gas plants to bypass connection delays.
  - Microsoft is to build its own power station as part of a new €900m data centre in Dublin, it has been reported.
  - The gas-fired generator plan is because of worries about future constraints on the national energy grid.
- Offshore wind developers might export energy as hydrogen if connections are delayed.

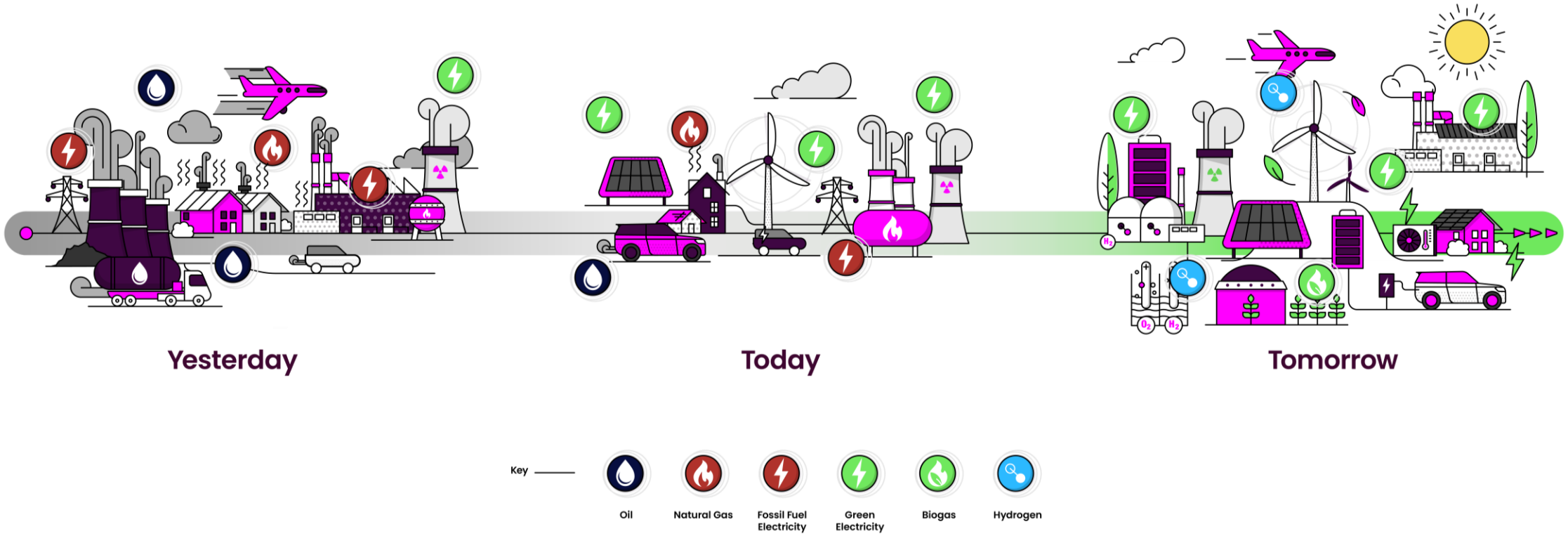
Whole energy illustrative opportunities

Converged connection process across vectors, could create a level playing field across different connections solutions available


Thank you!

UK Gas Market Challenges

UK Energy Landscape: Navigating the Shift



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Identification process

We have developed an understanding of the challenges faced by the UK gas market based on:

1

Developing Framework

Defining growth markets (hydrogen, CCS & biomethane), existing markets (LNG & methane) and framework timescales.

2

Market Monitoring

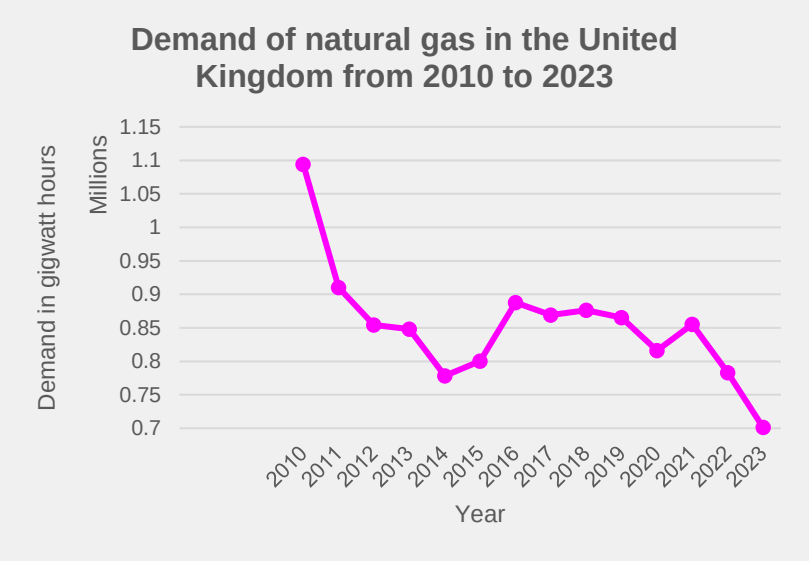
Scanning the market and building an understanding of the **change horizon**.

3

Identifying Key Market Challenges

Building an initial view of some of the key challenges facing each market **to verify with GAC members**

CH_4 Methane



Source: DESNZ

4 Key Challenges identified

1 Ensuring security of supply

Declining production and increasing reliance on imports via interconnectors and LNG, challenges arise in securing diverse and reliable sources of natural gas. This includes mitigating geopolitical risks, market volatility, and ensuring flexibility to balance supply-demand dynamics, especially during peak usage or global energy crises.

2 Decommissioning or repurposing infrastructure

Much of the gas infrastructure is ageing and may become redundant as the country transitions to low-carbon energy. Deciding whether to decommission or repurpose assets (e.g. pipelines for hydrogen) while managing costs, safety and operation challenges is paramount.

3 Decarbonising while ensuring reliability

Transitioning the gas network to low-carbon alternatives, such as hydrogen or using carbon capture technologies, without compromising the stability and flexibility of the grid. This is especially critical during high-demand periods when natural gas still plays a dominant role in balancing the electricity system.

4 Developing regulatory frameworks

Existing regulations could be enhanced to increase the incentive of mitigation of methane leakage across the gas supply chain. Enhanced frameworks are required to support robust monitoring, reporting, and verifying methane emissions alongside implementing carbon offset mechanisms.

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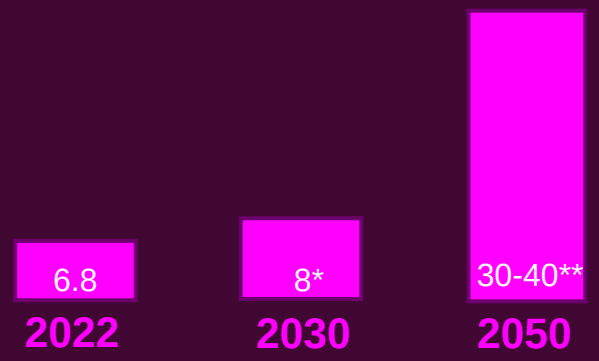
Biomethane



UK Biomethane injected into the grid (TWh)

* DESNZ modelling ** UK TIMES modelling

4 Key Challenges identified

1 Move towards a self-sustaining market

So far, support schemes have been tariff-based in order to support the high operational costs of anaerobic digestion. The current scheme (GGSS) ending in 2028, HMG is consulting on the development of a new market-based mechanism to help the industry becoming self-sustaining.

2 Develop cross-sectoral sustainability criteria

Biomethane production can deliver wider system benefits and deliver genuine GHG savings. The 2023 Biomass Strategy has called for a common GHG emissions calculation methodology for the biomass supply chain, including biomethane (feedstock and digestate management as well as methane emissions)

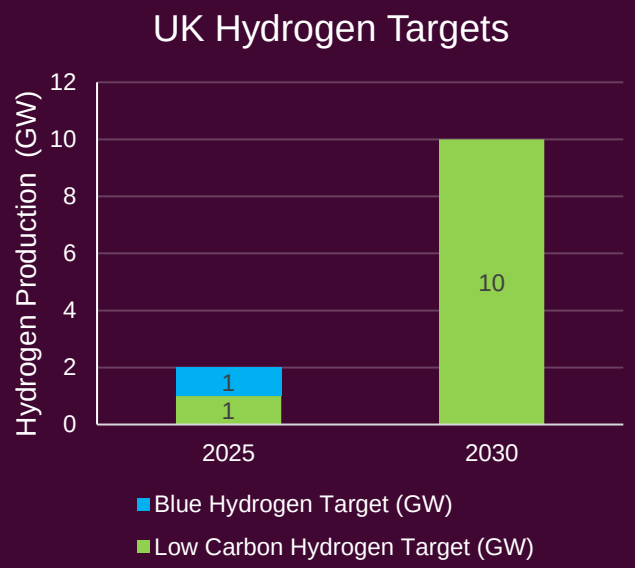
3 Unlock barriers to grid injection

The volume of biomethane injected to the NTS remains very limited, with planning & consenting issues faced by biomethane plants developers. At distribution level, biomethane often need to be enriched with propane in order to meet the Flow Weighted Average CV required by the Gas Calculation of Thermal Energy Regulations

4 Address the ETS pricing

The UK ETS isn't currently used to incentivise biomethane production because if mixed with fossil fuels, its emissions are not differentiated from fossil fuel emissions

Hydrogen



5 Key Challenges identified

1 Cost of Hydrogen

The upfront investment associated with hydrogen projects, as well as the factors affecting the levelized cost of hydrogen, and whether hydrogen can become competitive with natural gas considering the macroeconomic and geopolitical shifts.

2 Need for Transport and Storage Infrastructure

Developing dedicated transport and storage network to enable the hydrogen value chain to progress to a hydrogen market.

3 Demand Stimulation and Supply Chain Certainty

Complex and uncertain landscape for hydrogen off-takers during the early phases of the market and imbalance between production and demand incentives leading to a volatile supply chain. Some vertical integration of supply chains potentially leading to further stagnation.

4 Nascent Market Frameworks

Hydrogen markets are in their nascency and require direction on market arrangements, system operation, connections, capacity, balancing and renumeration as the market develops beyond a point-point arrangement.

5 Regulatory and Policy Uncertainty

Decisions needed within the hydrogen policy and regulatory landscape that have broader market impact, including hydrogen for heat, and hydrogen blending.

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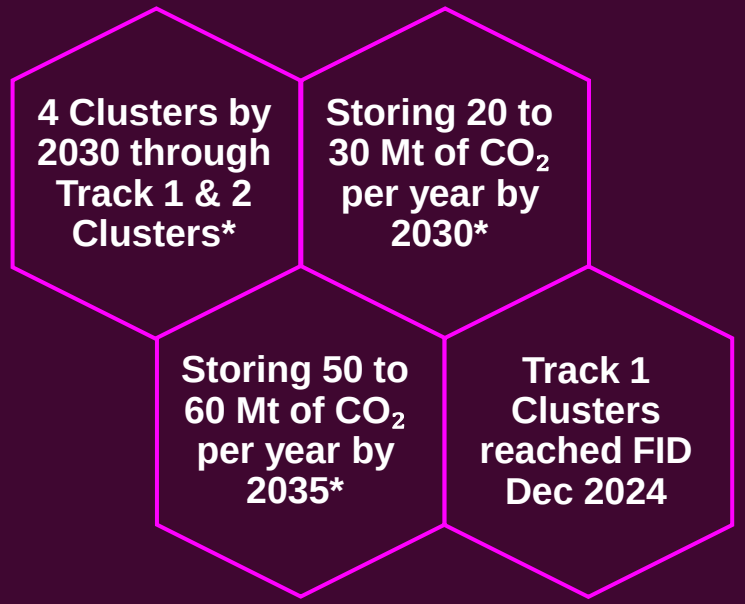
CCUS

Carbon Capture, Utilisation & Storage



* UK government CCUS targets

5 Key Challenges identified

1 Lack of incentive to invest

The UK ETS isn't currently high enough to incentivise CCUS investment, currently its somewhat cheaper to continue to emit than to not. Whilst the ETS is estimated to increase over time, delayed investment decisions in carbon capture tech by businesses could lead to delays/missed CO_2 targets in the future.

2 Lack of demand for low carbon (CCUS) products

Currently, it's challenging for companies to create a business case for investment in CCUS technology. One of the reasons for this is due to the offtake uncertainty. Higher costs often lead to higher priced products, and without guarantees on offtake at these higher prices, especially whilst other lower priced alternatives are available in the market, companies are reluctant to be the first to take the step.

3 Track system only for selected projects much more needed to reach goals

Only 8 projects (Track-1) have currently been selected and reached FID, quick decisions on projects in Track-2, Track 1 Expansion and beyond will be required to meet government CCS targets.

4 Limited CO_2 transportation options outside clusters

If an emitter is not located within a cluster there are currently no transport and storage options for their emitted CO_2, hence investing in carbon capture technology to capture CO_2 is redundant, as they currently have nowhere to send capture CO_2 to, thus emitters are currently reluctant to invest in carbon capture technology.

5 No Utilisation policy

Industries that currently use fossilized carbon in their processes could benefit from the utilization of captured CO_2, however, there is little policy or market mechanisms to facilitate this or enable a CO_2 market.

NESO National Energy System Operator

GAC Project Ideation

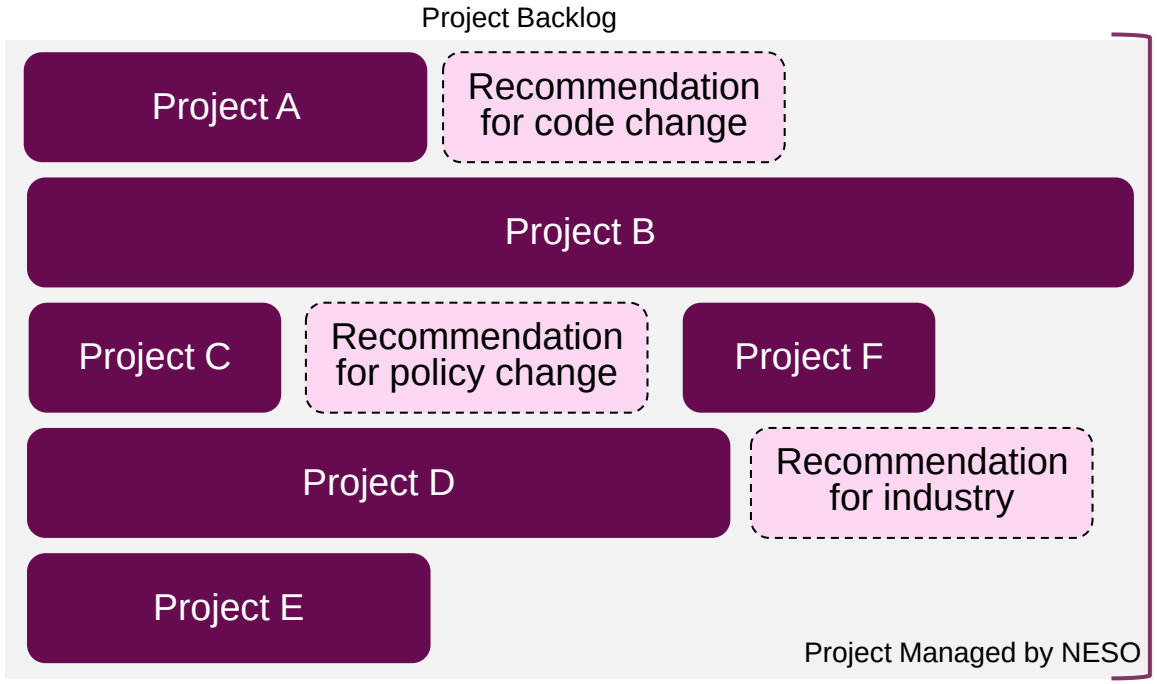
Objective: identify gaps as potential project opportunities for the GAC

Gas Future Market Plan Projects

Challenges identified in developing the gas markets of tomorrow

Projects identified and scope defined

- ✓ Defined output
- ✓ Manageable scope
- ✓ No duplication or replication with industry groups
- ✓ Aligned with priorities
- ✓ GAC agreement on Project Execution Plan developed by NESO



Future Market Plan

Worked Project Example

Problem Statement

There is a lack of whole energy system coordination to the issuing of warning notices and pre-emergency market incentive tools. Industry behaviour may therefore be unsupportive of the maintenance of whole energy system health.

This workstream seeks to review current gas and electricity market incentives to determine whether any alterations or additions, when enacted, would achieve a better outcomes for a stressed gas network.

Stakeholders/ Dependencies (not exhaustive)

- NESO
- National Gas (GSO/ NEC)
- Gas Task Group (GTG)
- Electricity Task Group (ETG)
- DESNZ/ Ofgem
- Health & Safety Executive (HSE)
- Network Operators

Outcomes/Outputs

Gas and electricity market stress response that is coordinated between system operators and produces market incentives that work together to bring the whole system back to balance.

Discussion:

Possible solutions/deliverables may include:

- Creation of new industry incentives
- Introduction of whole energy system pre-emergency warning notice
- Educational series for industry during a gas supply shortage event

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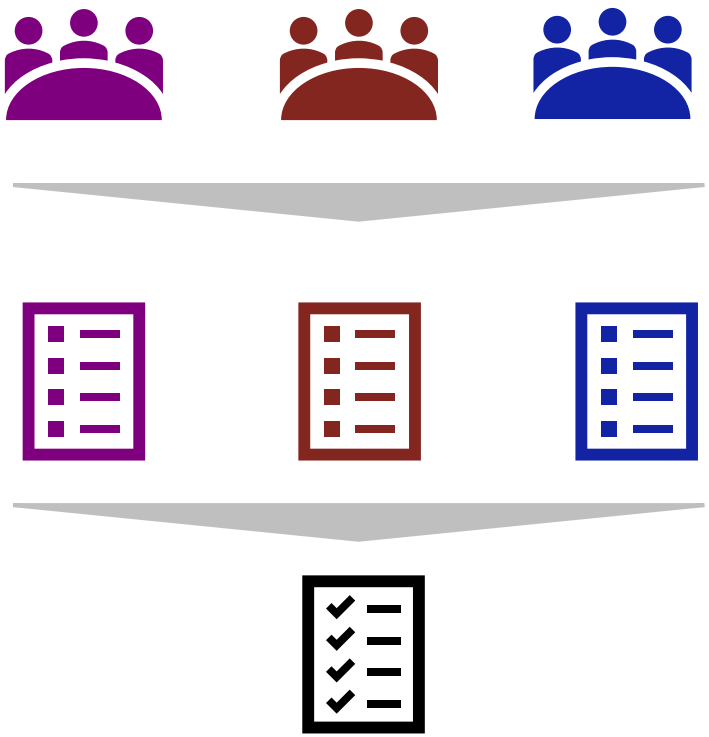
Project Ideation and Prioritization

Objective: identify gaps as potential project opportunities for the GAC, understanding some of the area's in discussion in industry

Working session on GAC Projects



Discussion in smaller groups

Facilitated by NESO

45-60 mins

Share back to the group

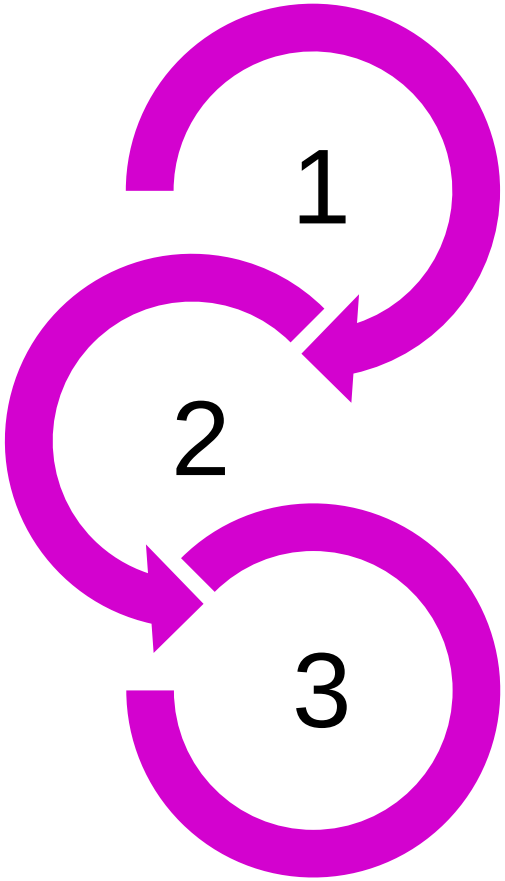
30 mins

GAC prioritisation exercise

30 mins

Wrap up and close

Next Steps



Confirming and circulating GAC dates for April, July and October 2025.

Feedback and follow ups

Defining project charters and project execution plans

Thank you

Contact us:

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NESO
National Energy System Operator