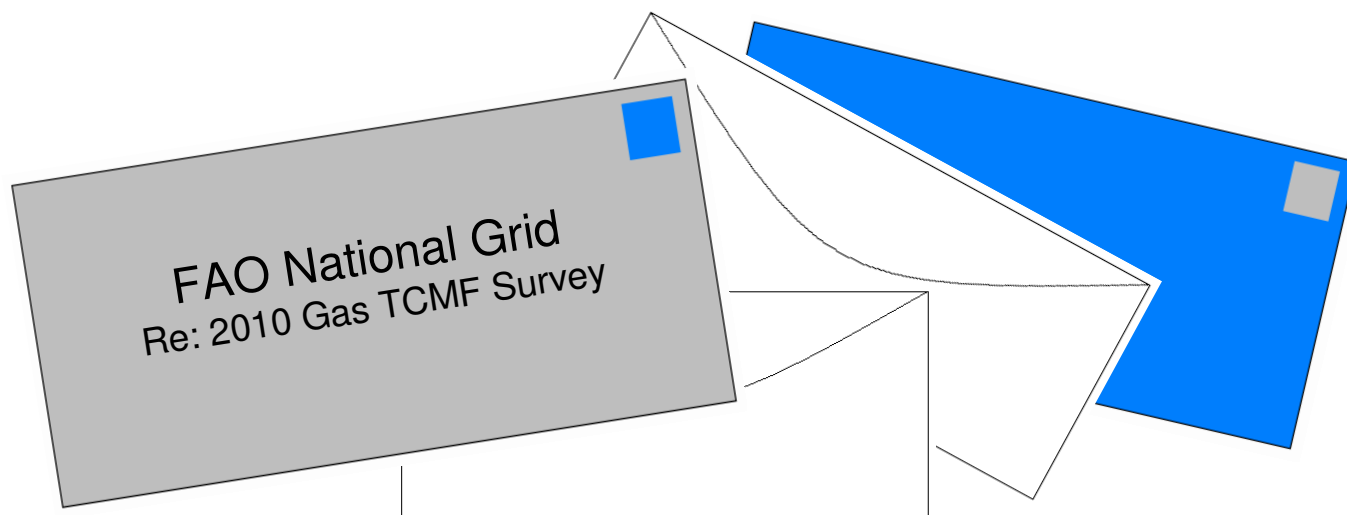

2010 Gas TCMF Survey Results

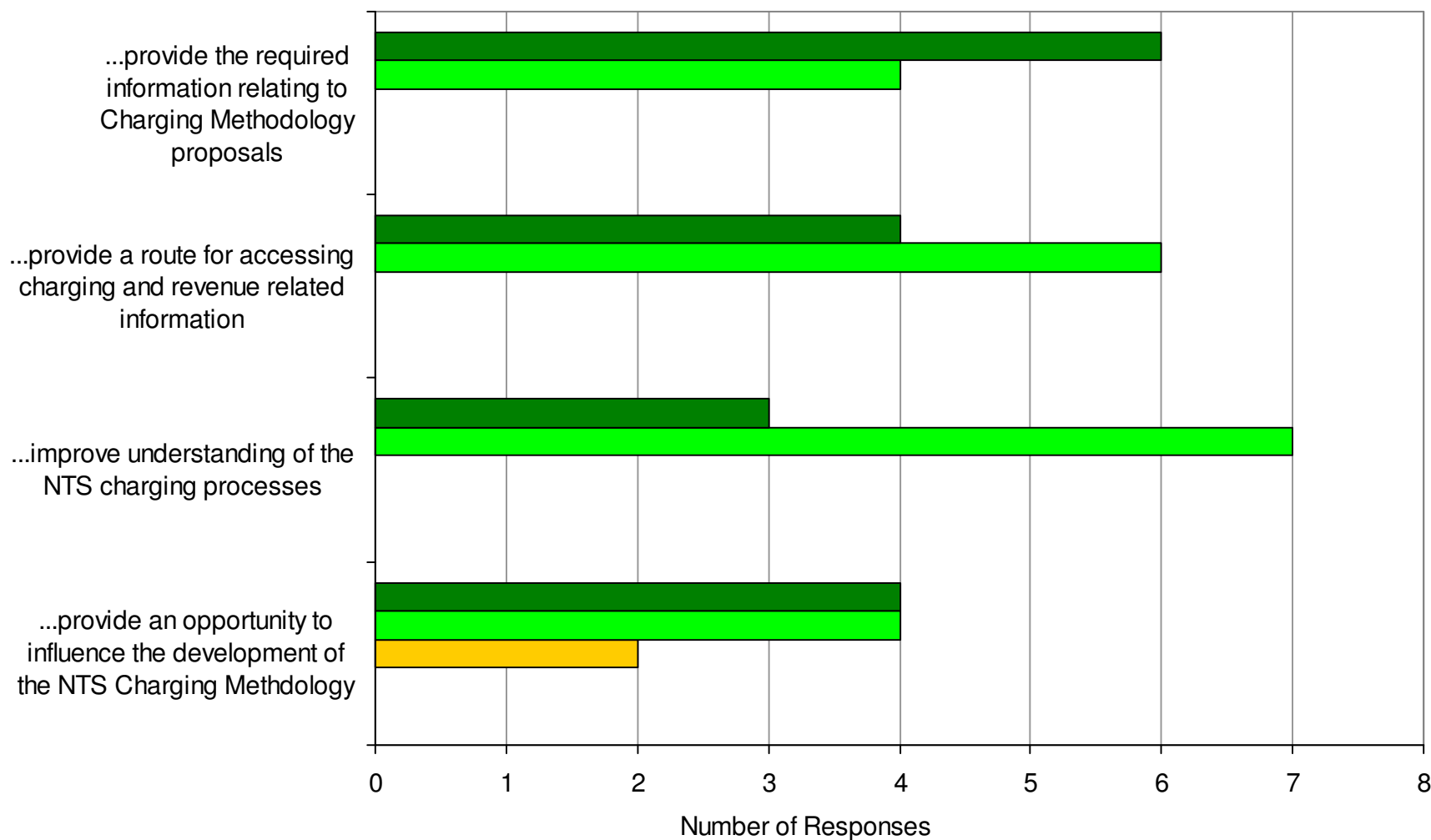
Gas TCMF - 7th April 2009

Introduction

- ◆ This presentation covers the results of the 2010 Gas TCMF survey
- ◆ Responses were invited from Shippers and other interested parties from 1st – 22nd March
- ◆ We received 10 responses



The Gas TCMF Meetings...

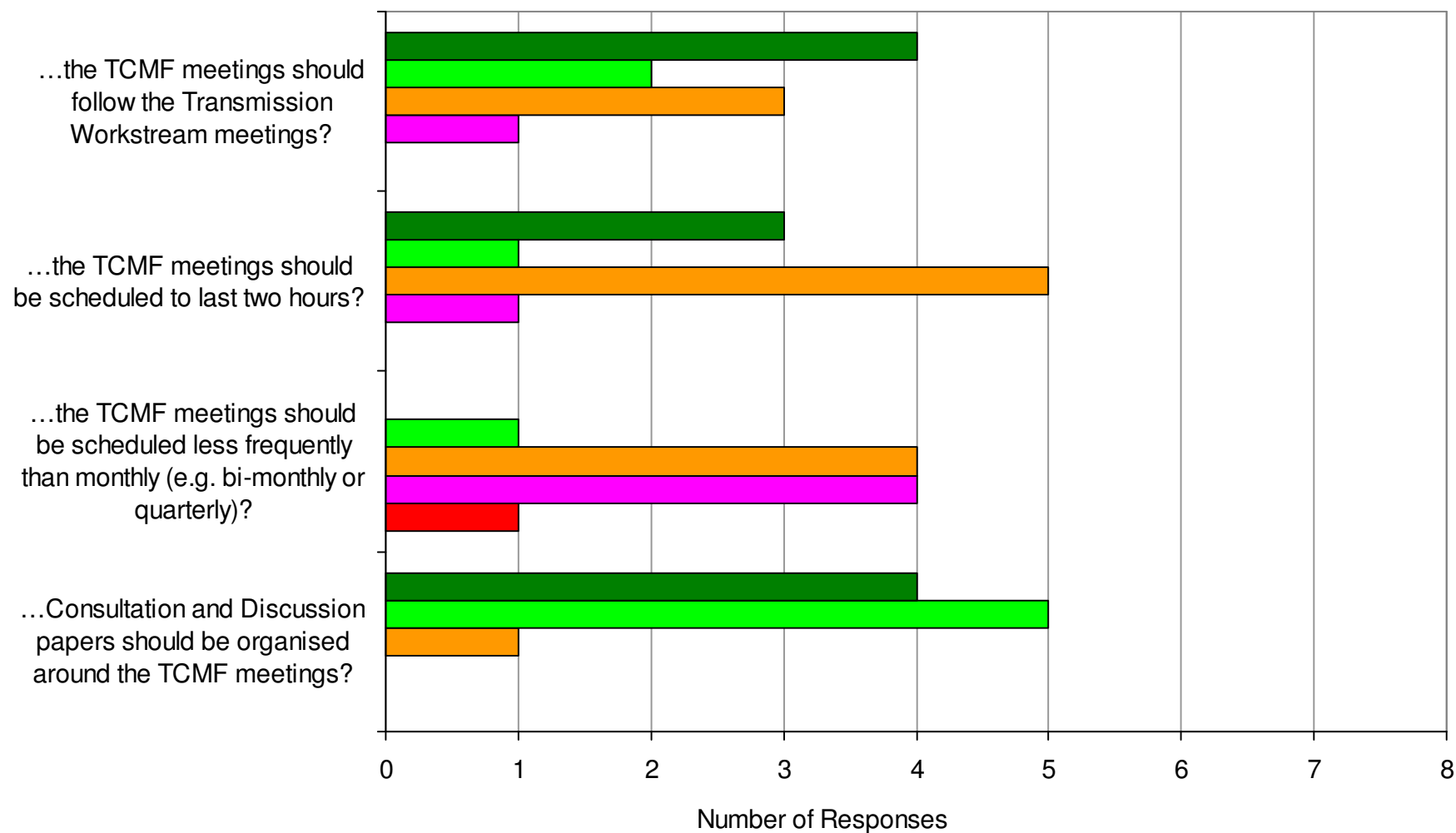


Strongly Disagree Disagree Neither Agree nor Disagree Agree Strongly Agree

nationalgrid

The power of action.

The Gas TCMF Meetings (Continued)...

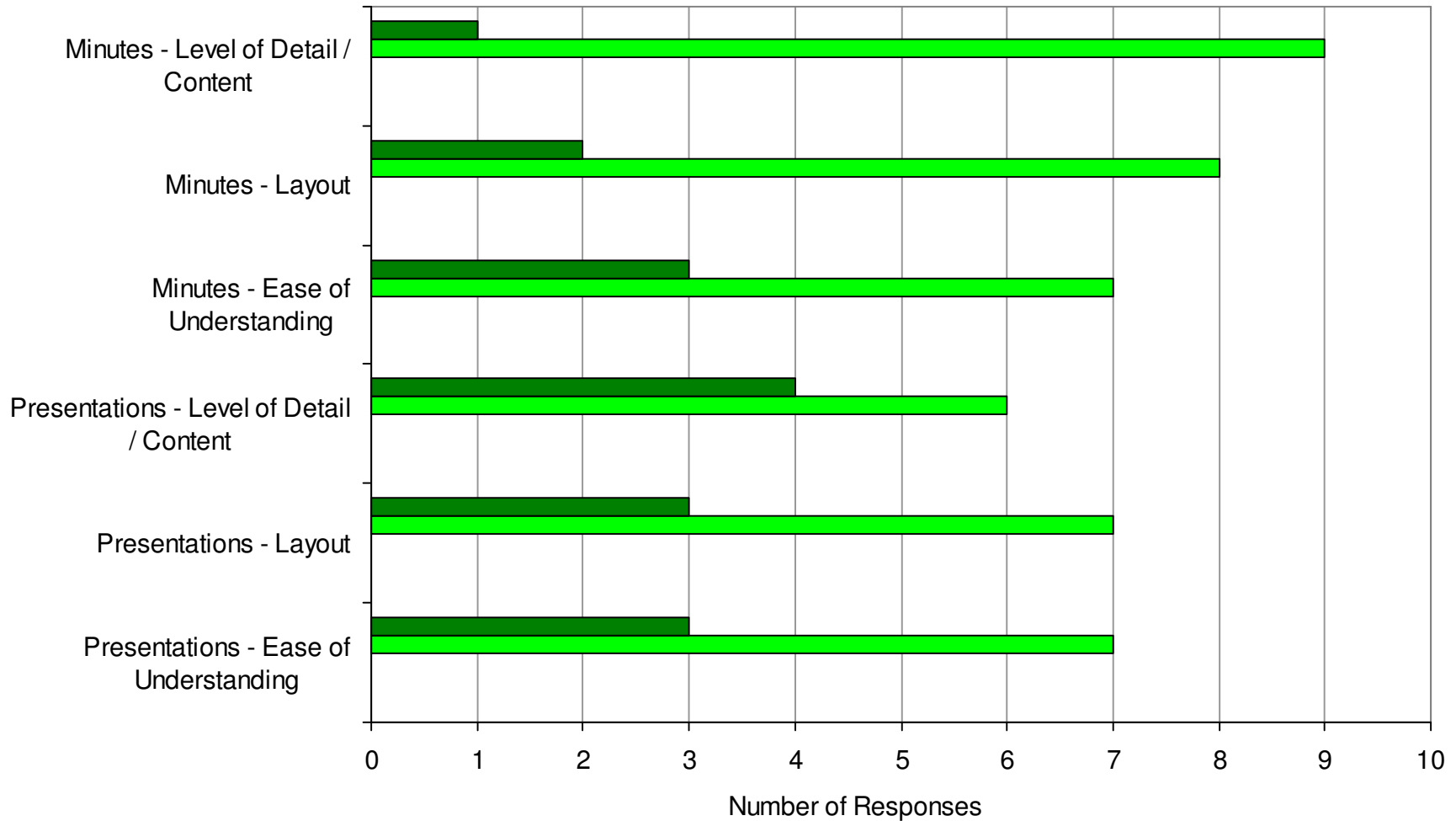


Strongly Disagree Disagree Neither Agree nor Disagree Agree Strongly Agree

nationalgrid

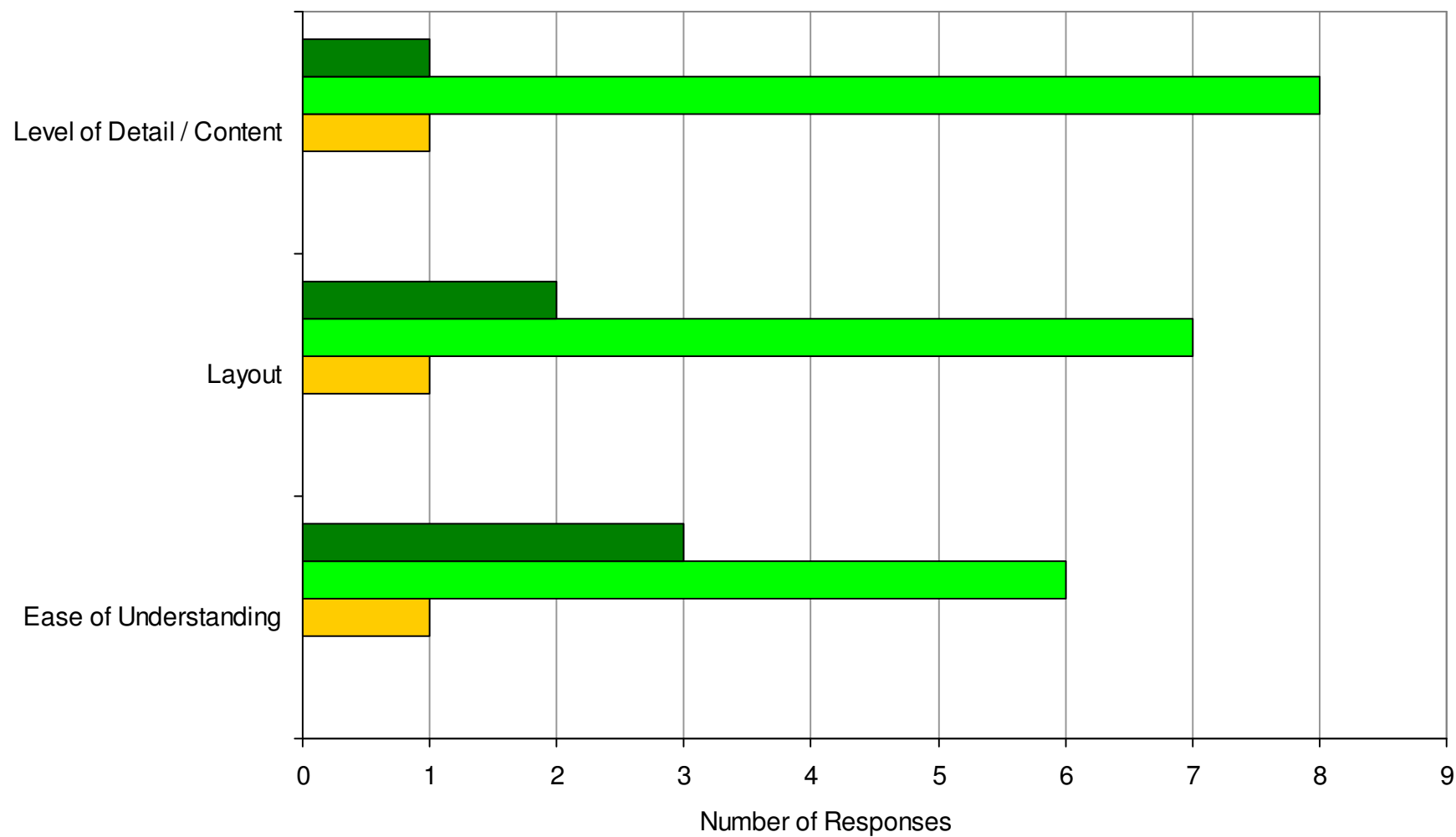
The power of action.

TCMF Material –Presentations & Minutes



Very Dissatisfied Dissatisfied Neither Satisfied nor Dissatisfied Satisfied Very Satisfied

TCMF Material – Consultation Papers

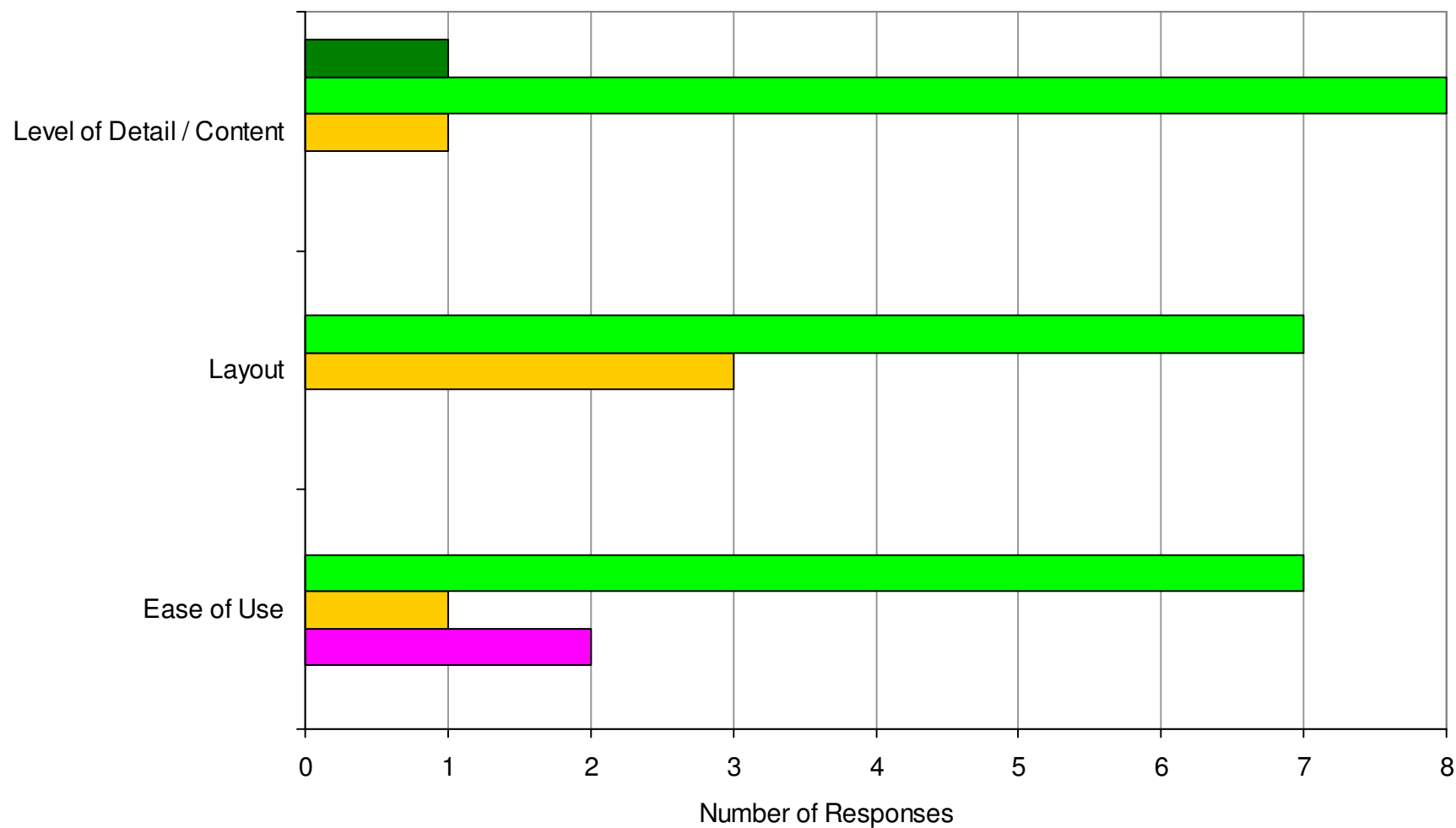


Very Dissatisfied Dissatisfied Neither Satisfied nor Dissatisfied Satisfied Very Satisfied

nationalgrid

The power of action.

TCMF & Consultation Website Areas

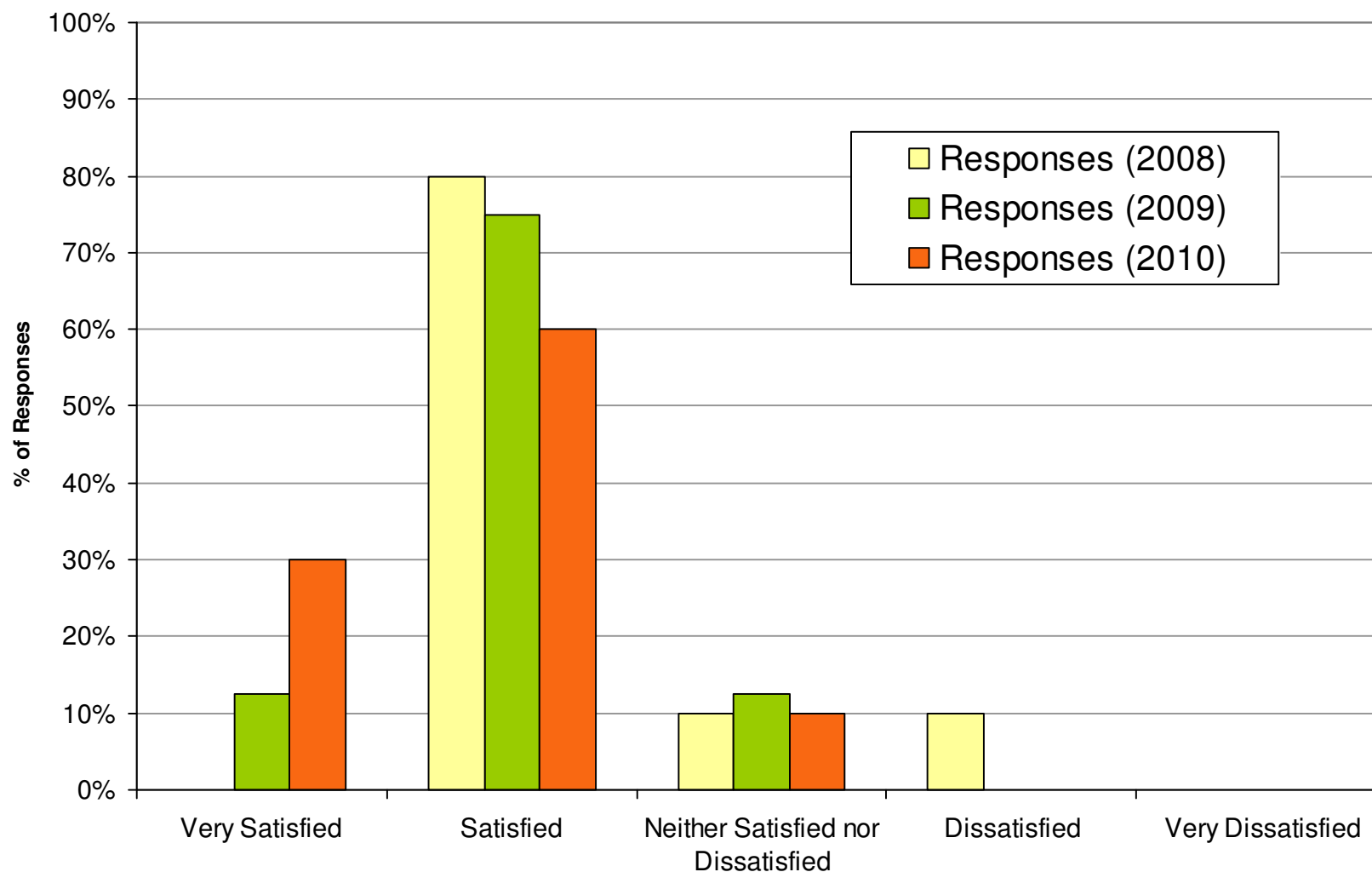


Very Dissatisfied Dissatisfied Neither Satisfied nor Dissatisfied Satisfied Very Satisfied

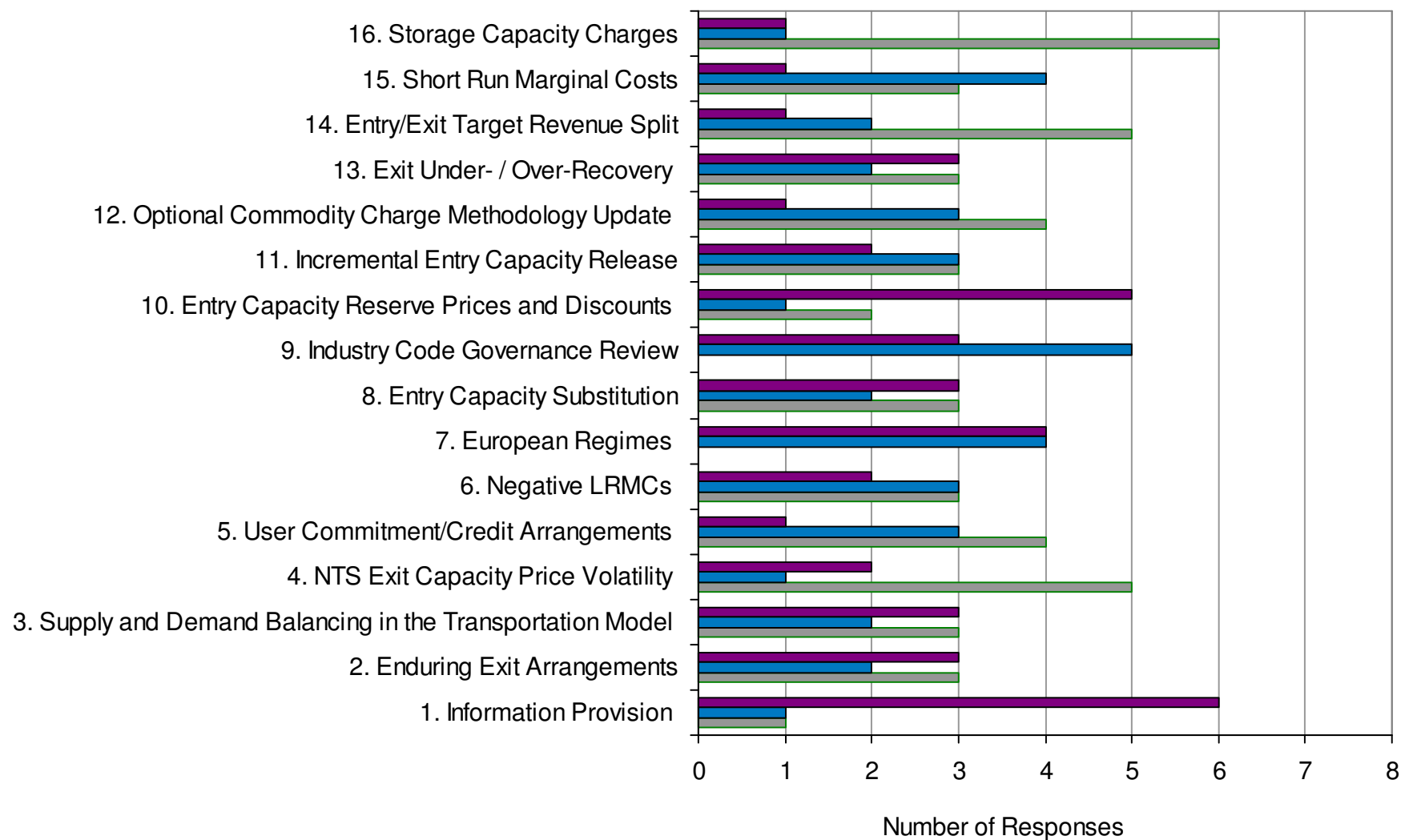
nationalgrid

The power of action.

Satisfaction with the Gas TCMF



2010 Gas TCMF Priority Work Areas



Low

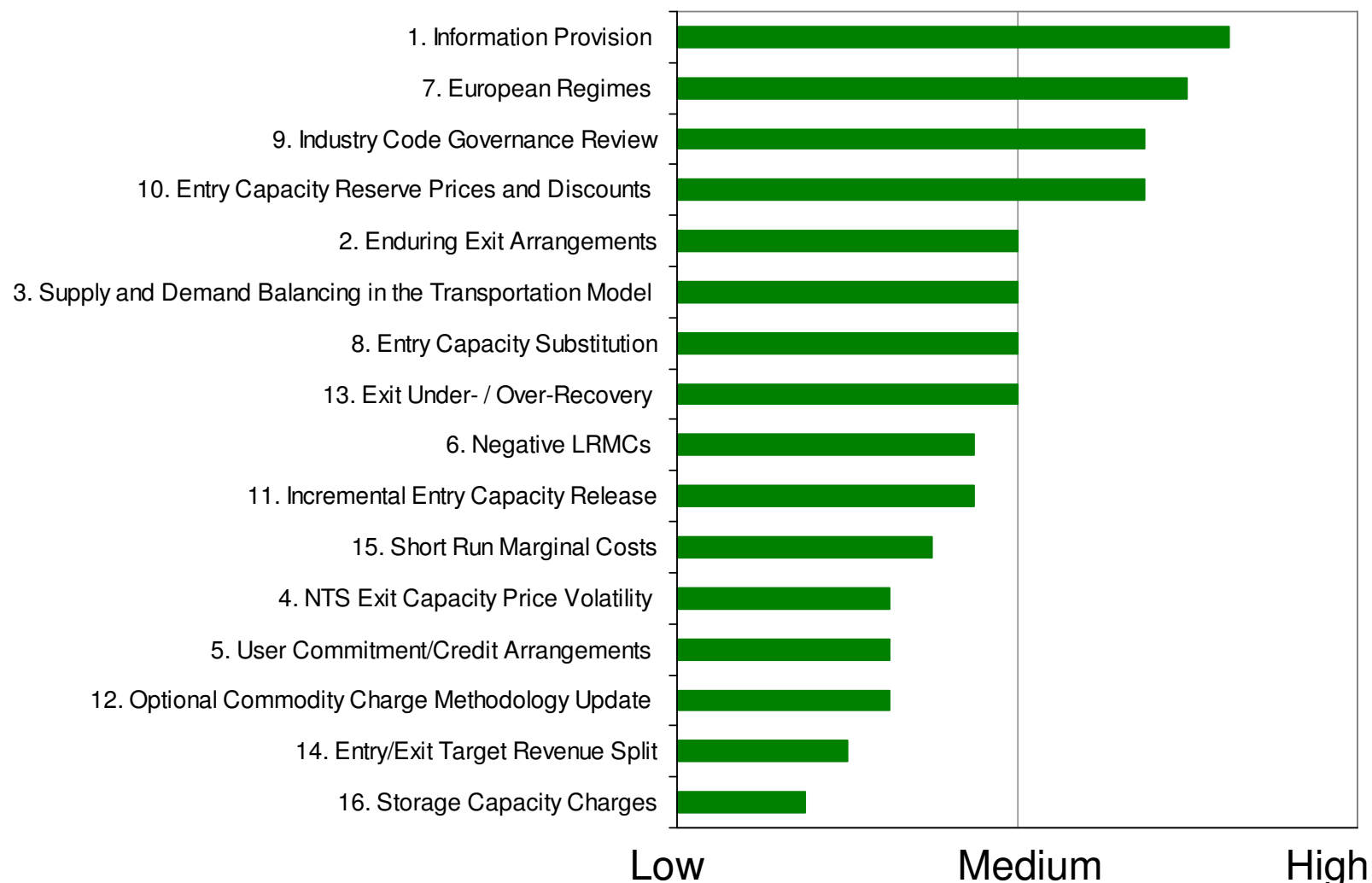
Medium

High

nationalgrid

The power of action.

2010 Gas TCMF Priority Work Areas



Average score of those who expressed a preference

NB The number before the topic is the priority from the 2009 survey

nationalgrid

The power of action.

Comments – How are we doing?

- ◆ “The missing question is **how well comments are reflected in the final reports** - generally much better in this area than other consultations!”
- ◆ “The TCMF has always been, and continues to be a **useful meeting for discussing charging proposals, price changes and their drivers.**”
- ◆ “The TCMF has always been, and continues to be a useful meeting for discussing charging proposals, price changes and their drivers. In addition NGG NTS' **voluntary adoption of Mod 186 data has proved most useful.**”

Comments – What could we do better?

- ◆ “The reports generally reflect the diversity of views, ... Would also like to see **more detailed rationale from NG NTS where they disagree with particular points made by Shippers.**”
- ◆ “Where Transporter **Licence references** are made please **ensure the exact section is referenced** and include a direct link to that section of the Licence (e.g. a footnote), as trying to find it (on Ofgem's website) is often extremely difficult.”
- ◆ “it is not always clear how open NGG NTS are to **suggestions to develop charging methodology proposals**. Sometimes NGG NTS will take Shipper suggestions on board, and adopt them fully; however other suggestions are dismissed - there does not appear to be any **rationale for these decisions**”
- ◆ The **NG website**; “**Lots of scrolling is required ! It could be more user friendly**”

Comments – What should we be doing going forward?

- ◆ “**A period of stability** is needed to consolidate the constant change we have experienced over the last 5 years. Nearly all the major items have been completed & we should not focus our effort on changes of questionable value.”
- ◆ “some **changes will be driven forward by other initiatives**, such as the **governance review** or **European legislation**. ... mindful of the **capacity allocation framework guidelines** and **congestion management principles** which are currently progressing. Also work is due to begin on **tarification framework guidelines** later this year and it would not be sensible to progress changes in the UK which may be at odds with future EU legislation.”