

Keynote speech

We will start at 11.32 to allow participants to finish previous meetings and join the call

Slido.com
#GT1

Who will be speaking?

Jon Butterworth
CEO



Jake Tudge
Director of
Corporate Affairs



Rhys Ashman
Strategy &
Performance
Manager



Jennifer Pemberton
Customer Strategy
Manager



Logistics



Should last for approximately about 45 min



Questions and polling via slido.com #GT1



All callers will be placed on mute



We will circulate the slides and a recording of this webinar

Agenda

1. Keynote speech

2. Policy landscape

3. Performance against our Priorities

4. Questions

1

Keynote speech - Jon Butterworth CEO



Safety Moment - Red Arrows



- Engineer Corporal Jonathan Bayliss was killed during a training flight on 20th March 2018 from RAF Valley in North Wales
- The jet in which he was a rear seat passenger crashed when a practised engine failure after a take-off manoeuvre, led to the aircraft stalling and crashing
- The pilot was able to eject himself before it hit the ground, suffering non-life-threatening injuries.

Key Findings

- Lack of governance and leadership
- Corporal Bayliss had not had any simulator training before this flight
- Lack of continuation training, specifically PEFATO (Perform Engine Failure After Take Off) and practice forced landing likely resulted in skill fade
- The pilot, although very experienced, was suffering from fatigue and was distracted



THE TIMES
 Friday October 7 2022 | thetimes.co.uk | No 73908
 £2.50 (€1.70 to subscribers)
 Includes the first issue

HOW TO WIN COUNTDOWN!
 20
 19
 18

Should you get a smart thermostat?
 Rickie-Martin

Gas import threat puts UK at risk of blackouts

Firm friends again: Truss renews bond with Macron

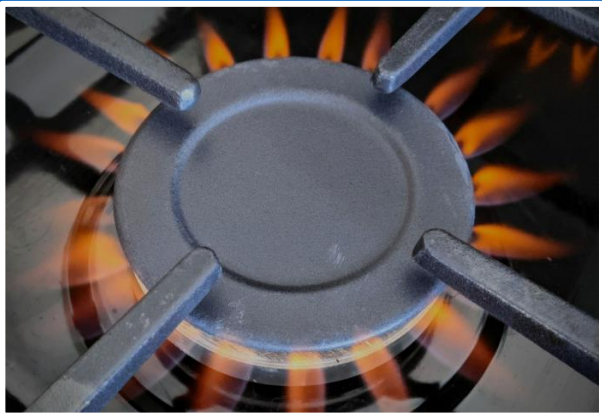
PM blocks energy-saving information campaign

Energy Crisis: Energy Editor
 Steven Swindell joins our Editor
 Britain faces rolling blackouts this winter if it cannot import enough gas, says the Energy Editor. What will the government do to avoid this?

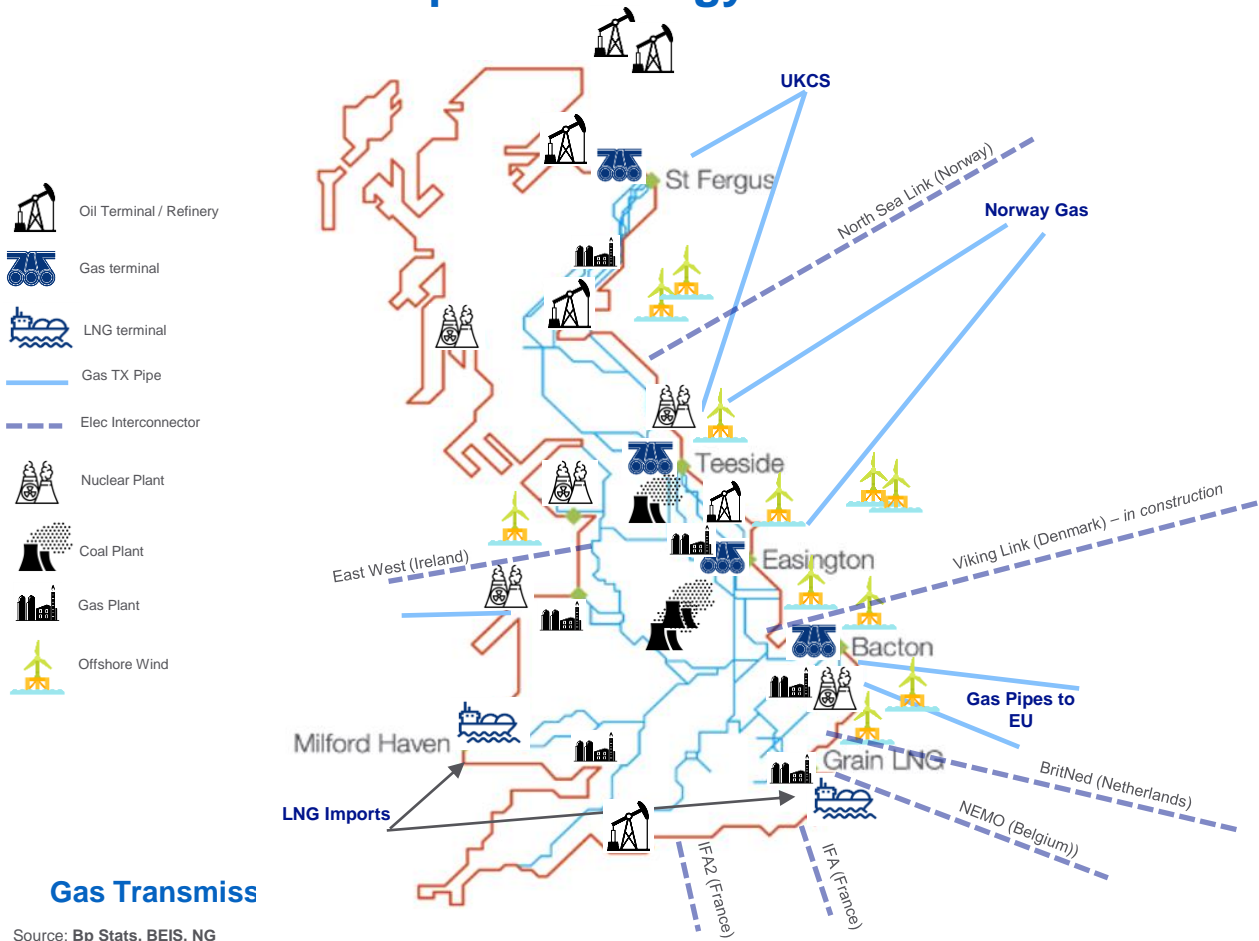
Oliver Wright, Bruno Waterfield
 Matt Oakes

Liz Truss declared that President Macron is a 'strong' ally of Britain yesterday as the two leaders announced plans to renew the historic cordale after three years of diplomatic quiet.
 In a remarkable rapprochement, the prime minister said that an annual summit with the French president would be revived next year and co-operation on digital regulation renewed.

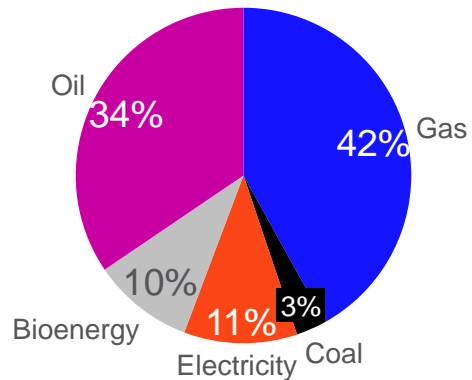
The announcement came after the two leaders met on the margins of the meeting of government of a new European Political Community of 44 countries, including the EU's 27 member states. Truss said that the new working "very closely with President Macron and the French government."



Security of Supply: UK has a diverse energy supply mix, with mixture of domestic and imported energy sources



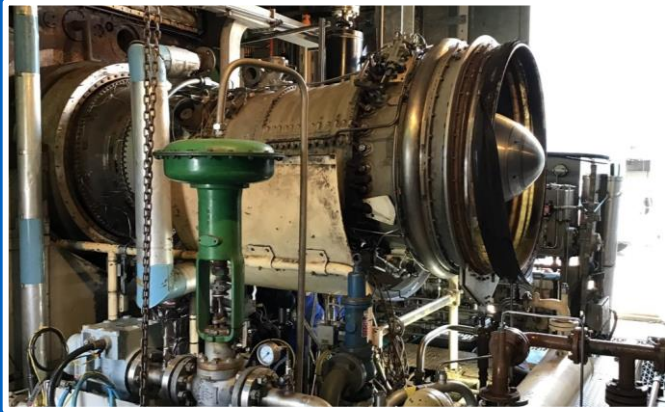
UK Total Energy Supply Mix (2021)



UK Total supply of energy amounted to **~2000TWh** equivalent in 2021, of which **~58%** was from imported sources

Gas Transmiss

Source: Bp Stats, BEIS, NG



2

Policy landscape

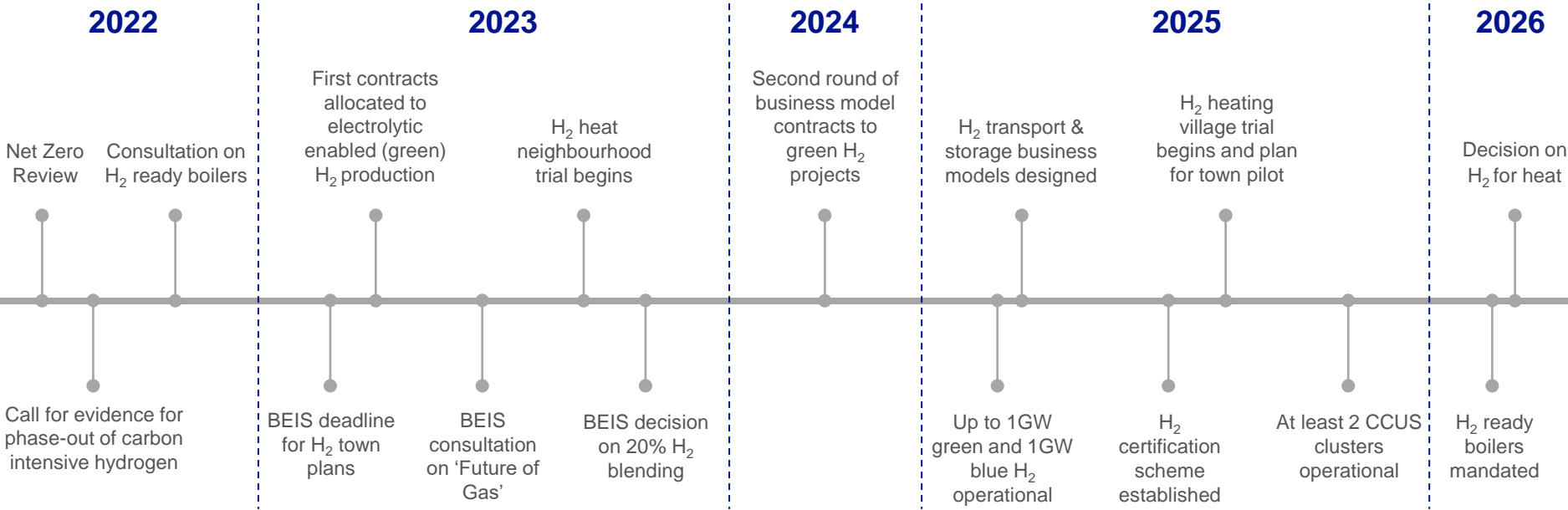


Significant announcements from HMG require a step change in delivery

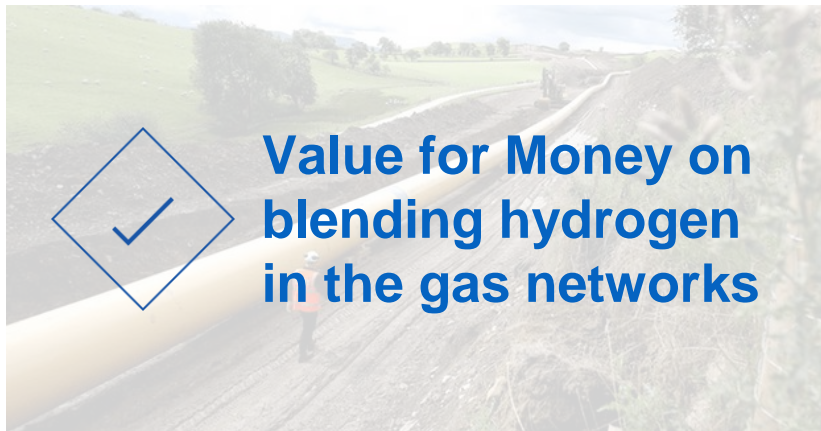


2030	2035	2050
50GW offshore wind	Up to 70GW solar	24GW civil nuclear deployment
10GW hydrogen production	Decarbonised UK electricity system	Climate Change Act 2008
		Net Zero by 2050
4 CCUS industrial clusters		

There are a number of critical decisions and steps in the coming years



2023 is a pivotal year for the development of a GB hydrogen economy



3

Performance against our Priorities



Consumer Priorities



Our Priorities

“I want an affordable energy bill”

“I want to use energy as and when I want”

“I want you to deliver a sustainable energy system”

Operate safely, reliably & flexibly

Deliver sustainable value for our customers & shareholders

Drive a positive environmental & community impact

Shape the energy markets of the future

Invest in our people, grow our capability & value everyone’s contribution

Operate safely, reliably & flexibly

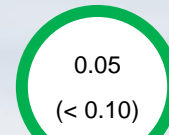
To find out more, please join us on the following webinars over November and December

- Operating the Network - 2nd Dec @ 9am

Keeping our people & the public safe



Tier 1 and 2 process safety incidents

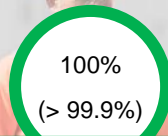


Lost time injury frequency rate

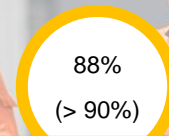


High Potential Controllable Events

Providing a reliable & available network



Network Reliability



Compressor fleet reliability

Preparing for winter

Gas Winter Outlook
2022/23

October 2022

MailOnline

UK National Grid doubles emergency planning exercise from two to four days amid energy crisis: Experts will discuss rationing electricity during crisis talks... as No10 insists Britain does NOT face blackouts this winter



Deliver sustainable value for customers & stakeholders

To find out more, please join us on the following webinars over November and December

- Operating the Network - 2nd Dec @ 9am
- Accessing Energy Data – 1st Dec @ 11am
- Innovation – 13th Dec @ 1pm

Engaging, listening & acting on feedback

8.5
(>8.2)

Customer satisfaction score

8.8
(>8.6)

Stakeholder satisfaction score

Delivering our RIIO-2 outputs & commitments

33%
(>90%)

Price Control Deliverables with 'Green' Status

91%
(>90%)

Business Plan Commitments with 'Green' Status

Performing against our incentives

£4.3m
(-£5.2m to +£5.2m)

Minimising constraints on the NTS

-£0.2m
(-£1.6m to +£2.8m)

Residual Balancing

-£0.3m
(-£1.5m to +£1.5m)

Demand forecasting

£0.5m
(-£1.5m to +£1.5m)

Maintenance days

Drive positive environmental & community impact

To find out more, please join us on the following webinars over November and December

- Sustainable Construction – 30th Nov @ 9am
- Monitoring and Mitigating Methane Emissions – 8th Dec @ 1pm
- Driving a Positive Environmental and Community Impact Webinar - 14th Dec @ 10am

Reducing emissions

Supporting our local communities

Developing national and local skills partnerships and initiatives

1189 tonnes
(<2897t)

Venting from our compressor fleet

0.22mt
(<0.48mt)

Emissions from running our compressors



Believe in children
Barnardo's

Catching up



Shape the energy markets of the future

To find out more, please join us on the following webinars over November and December

- Facilitating Commercial & Regulatory Change – 29th Dec @ 9.30am
- Blending – 5th Dec @ 10am
- Transitioning to 100% – 6th Dec @ 11am
- Hydrogen Regulatory Framework – 7th Dec @ 12pm
- Future of Heat – 9th Dec @ 1.30pm
- FutureGrid Progress Report – 12th Dec @ 1pm
- Innovation – 13th Dec @ 1pm

Demonstrating that our plans are in the interests of UK industry & consumers

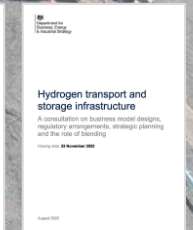
Delivering a realistic & cost efficient natural gas to hydrogen transition plan

Collaborating to design the market frameworks of the future

FutureGrid

ProjectUnion

Gas Market Plan



Invest in our people, grow our capability & value everyone's contribution

Ensuring that our people are supported to deliver their potential

75%

(> 75%)

Employee engagement score

100%

(> 75%)

% of managers moving out of the lowest leadership score bracket

Engaging our people in how we work, & how they want our business to be run

75%

(>68%)

Employee 'safe to say' score

Recruiting, developing & retaining a talented & diverse workforce

37.3%

(> 37%)

% of our workforce that is diverse

37.5%

(> 28%)

% of promotions that are diverse

Quick poll

Do our priorities continue to deliver your needs?

Yes

Somewhat

No



Future Webinars

Event Name		Date / Time	Presenters
Facilitating Commercial & Regulatory Change	Sign Up	Tuesday 29th November @ 09:30	Ian Radley, System Operations Director
Sustainable Construction	Sign Up	Wednesday 30th November @ 09:00	Mark Lissimore, Construction Director
Accessing Energy Data	Sign Up	Thursday 1st December @ 11:00	Steven Vallender, Asset Director
Operating the Network	Sign Up	Friday 2nd December @ 13:00	Ian Radley, System Operations Director
Blending	Sign Up	Monday 5th December @ 10:00	Tony Green, Hydrogen Director
Transitioning to 100%	Sign Up	Tuesday 6th December @ 11:00	Martin Cook, Commercial Director
Hydrogen Regulatory Framework	Sign Up	Wednesday 7th December @ 12:00	Tony Nixon, Regulation Director
Monitoring and Mitigating Methane Emissions	Sign Up	Thursday 8th December @ 13:00	Steven Vallender, Asset Director
Future of Heat	Sign Up	Friday 9th December @ 13:30	Tony Green, Hydrogen Director
FutureGrid - Progress Report	Sign Up	Monday 12th December @ 14:00	Tony Green, Hydrogen Director
Innovation	Sign Up	Tuesday 13th December @ 13:00	Tony Green, Hydrogen Director
Driving a Positive Environmental & Community Impact	Sign Up	Wednesday 14th December @ 10:00	Jake Tudge, Corporate Affairs Director

Questions



Quick poll results

Do our priorities continue to deliver your needs?

Yes

Somewhat

No



What next?



You will receive the recording and material from today's session



If you have any further questions or would like to discuss anything specific please get in touch with Jennifer.Pemberton@nationalgrid.com



Feedback is important to us, therefore if you have not already taken part, we would like to put you forward for a survey

Thank you for joining us





Gas

Transmission