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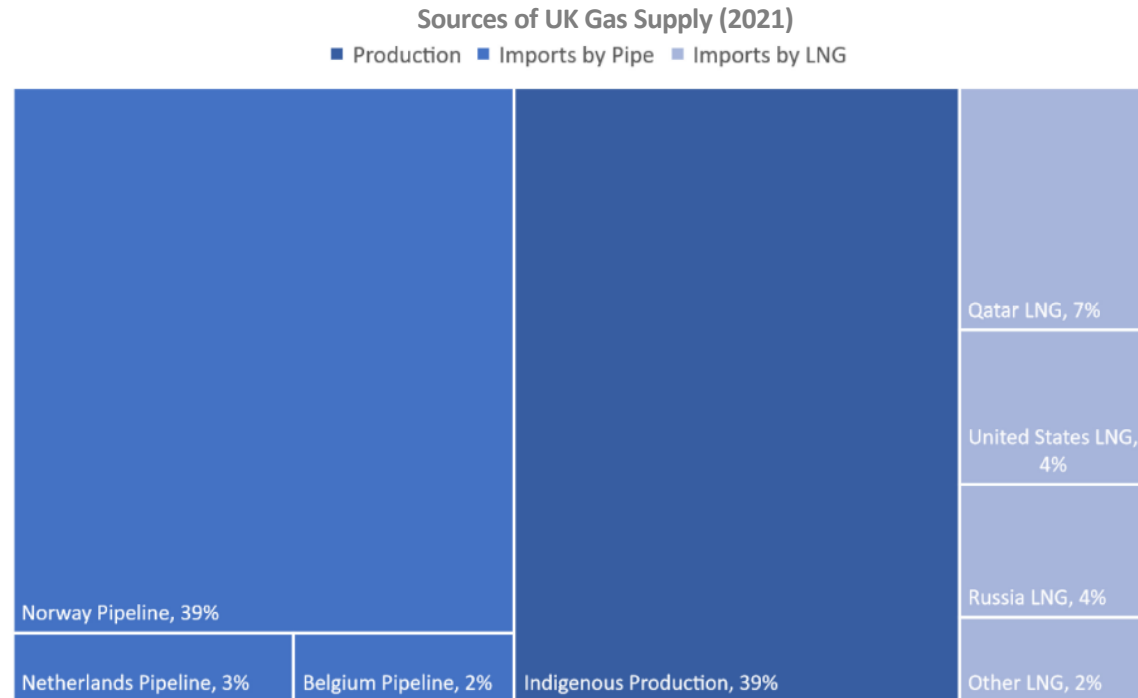
# Gas Security of Supply Policy & Analysis Outlook

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Department for Energy Security and Net Zero



# Global developments posed a significant challenge to the traditional GB policy landscape

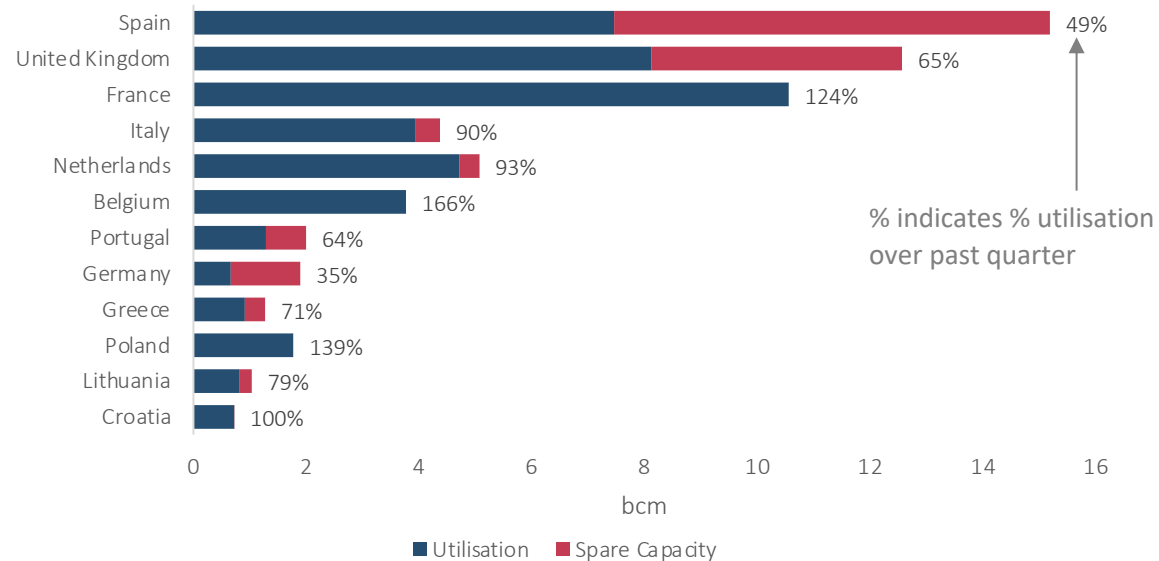


Source: BEIS Energy Trends, December 2022

Department for  
Business, Energy  
& Industrial Strategy

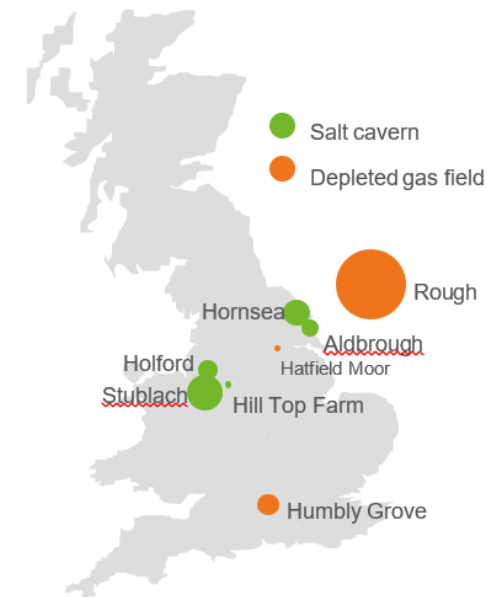
# Global developments posed a significant challenge to the traditional GB policy landscape (II)

European LNG Quarterly Capacity and Utilisation  
(October - December 2022)



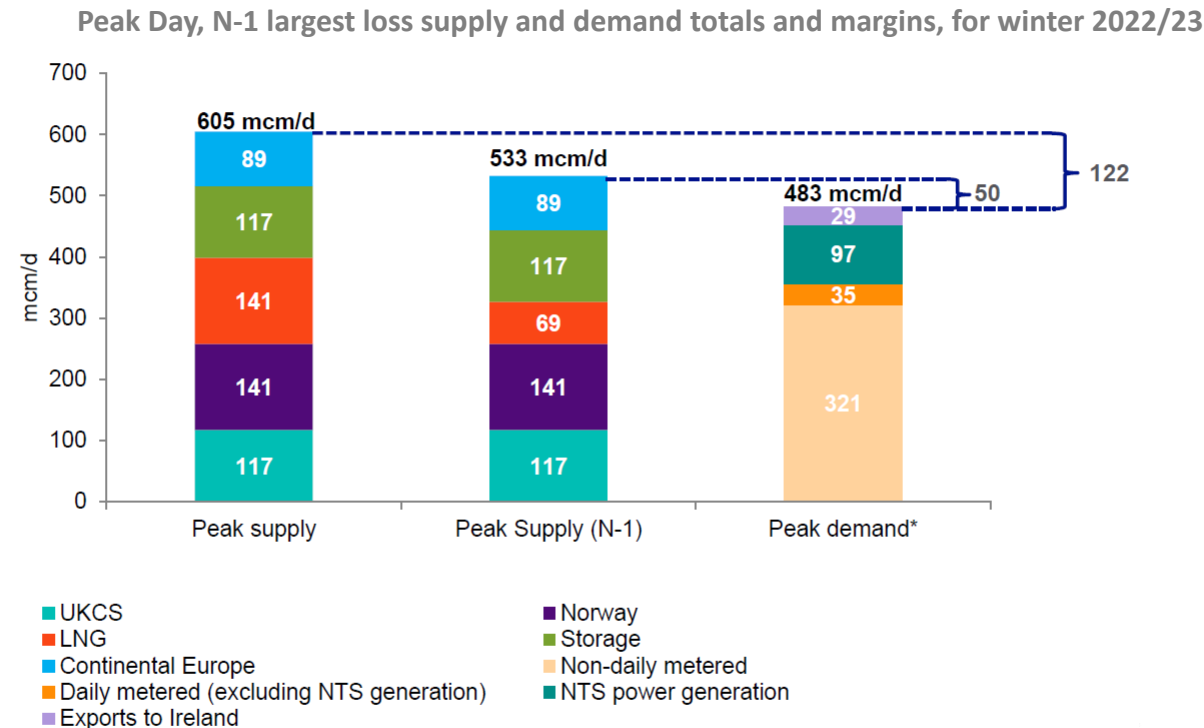
Source: ICIS/Rystad data

GB Gas Storage Sites



Notes: Eight commercially operated GB natural gas storage sites, max capacity 2.5bcm, max deliverability ~122mcm/day.

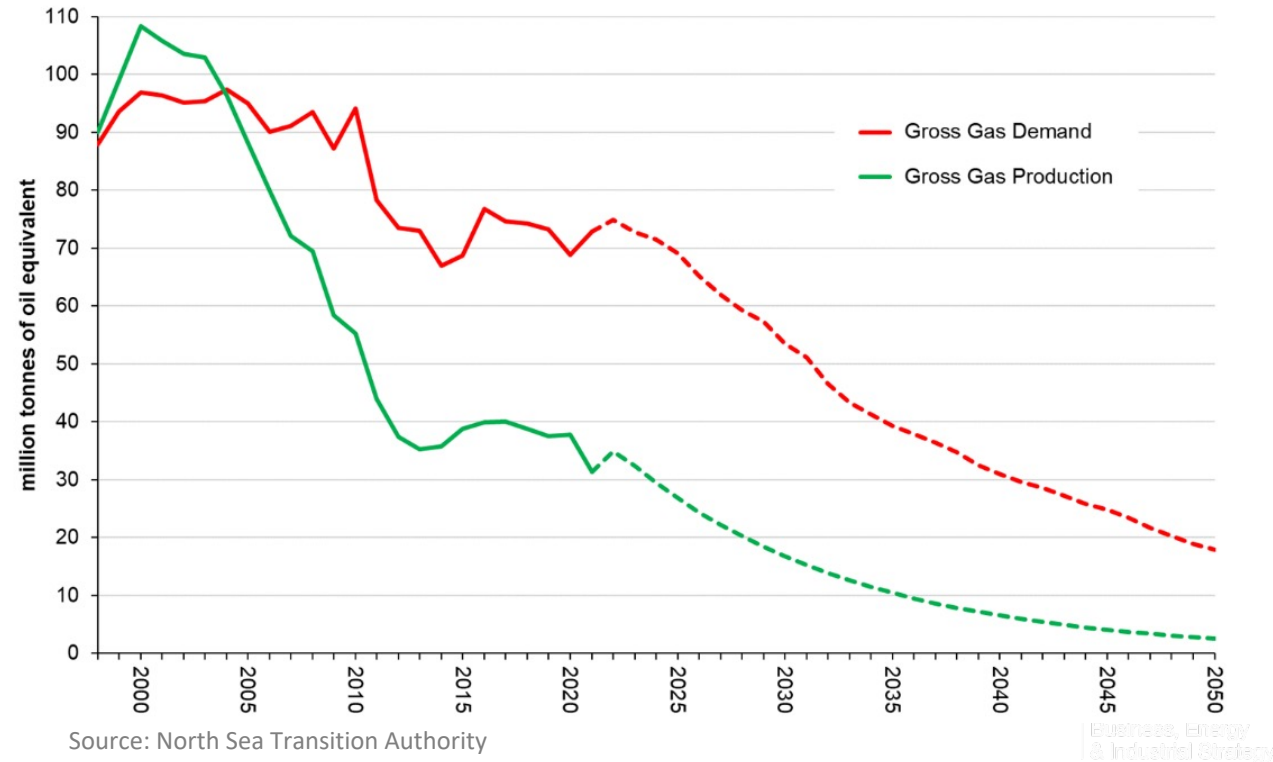
# Rapid development of evidence and analytical tools required to support the near-term policy response



Source: Gas Winter Outlook 2022/23, National Grid

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# An enduring change in policy approach - significant and long-term policy questions unleashed



# An enduring change in policy approach - significant and long-term policy questions unleashed (II)

Assumes large levels of residential heating comes from blue hydrogen, similar to the NZS hydrogen scenario.

No residential end user demand for hydrogen and higher uptake of heat pumps leads to lower gas demand

These broadly correspond with the scenarios and 2035 total gas demand figures from the previous slide

Not net zero compliant

