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Many of these assumptions, risks and uncertainties relate to factors that are beyond National Grid’s ability to control, predict or estimate precisely, such as changes in laws or regulations, including any arising as a result of the current energy crisis, announcements from and decisions by governmental bodies or regulators, including those relating to the RIIO-T2 and RIIO-ED2 price controls and the creation of a future system operator; the timing of construction and delivery by third parties of new generation projects requiring connection; breaches of, or changes in, environmental, climate change and health and safety laws or regulations, including breaches or other incidents arising from the potentially harmful nature of its activities; network failure or interruption (including any that result in safety and/or environmental events), the inability to carry out critical non-network operations and damage to infrastructure, due to adverse weather conditions including the impact of major storms as well as the results of climate change, due to counterparties being unable to deliver physical commodities, or due to the failure of or unauthorised access to or deliberate breaches of National Grid’s IT systems and supporting technology; failure to adequately forecast and respond to disruptions in energy supply; performance against regulatory targets and standards and against National Grid’s peers with the aim of delivering stakeholder expectations regarding costs and efficiency savings, as well as against targets and standards designed to deliver net zero; and customers and counterparties (including financial institutions) failing to perform their obligations to the Company. 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John Pettigrew
Chief Executive, National Grid
Transforming our UK business

Since acquisition

- New leadership team
- RIIO-ED2 price control agreed
  - Targeting **100-125bps** operational outperformance
- Rolled out new branding
- Integrated corporate and back-office functions
- **£100m** of synergies identified across the Group

Continued **top quartile performance** across all key metrics
A compelling strategic rationale

- Increased electricity exposure
- Enhanced long-term growth
- Delivery of net zero
- Geographic and regulatory diversity
**Electrification: driving investment and growth**

**UK electricity demand to 2050**

<table>
<thead>
<tr>
<th>Year</th>
<th>TWh</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>100</td>
</tr>
<tr>
<td>2025</td>
<td>300</td>
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<td>2030</td>
<td>500</td>
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<td>2035</td>
<td>700</td>
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<td>2040</td>
<td>900</td>
</tr>
<tr>
<td>2045</td>
<td>900</td>
</tr>
<tr>
<td>2050</td>
<td>1000</td>
</tr>
</tbody>
</table>

**Distribution networks are changing**

- Smarter, multidirectional and flexible
- Growing to accommodate electrification
- >30% increase in annual investment from ED1 to ED2
- Long-term sustainable waves of growth

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1. Sources: Climate Change Committee, The Sixth Carbon Budget Electricity Generation (p38, Fig A3.4.a); FES – Future Energy Scenarios 2022, Data Workbook (tab ED1); S&P Global Insights - European Electricity Long-Term Forecast March 2023; Wood Mackenzie Europe Power Service, Great Britain Long Term Power Outlook Base Case, May 2023.

2. Nominal capital expenditure level
Enhancing our role in the energy transition

- UK’s largest energy networks company
- Whole system approach
  - Building resilient, flexible systems
  - Optimising transmission and distribution investment

£100m synergies over 3 years
- ~75% in UK, helping to underpin UK outperformance targets
- ~25% in US, supporting achieved returns
Maintaining diversity

- A balanced and diversified portfolio
  - Attractive growth and yield
  - Mix of real and nominal regulation within stable jurisdictions
- 70% of Group’s assets focused on electricity
- Asset base balanced across UK and US
- Progressive dividend delivered over past 20 years
- Total shareholder return higher than FTSE 100 over the past decade

Geographic and regulatory diversity

Asset base post strategic repositioning¹

Energy split
- Electricity ~70%
- Gas ~30%

Geographical split
- US regulated ~40%
- UK regulated ~50%
- NGV and Other ~10%

¹. Calculated as the proportion of actual FY23 asset base post completion of the acquisition of Western Power Distribution, and the sale of the Rhode Island business and majority stake in UK Gas Transmission and Metering
Summary
Cordi O’Hara
President, National Grid
Electricity Distribution
Welcome

National Grid Electricity Distribution

Key messages

• Strong track record of performance
• Targeting outperformance of 100-125bps in RIIO-ED2
• Long-term waves of investment for decades to come

Cordi O’Hara
President,
National Grid Electricity Distribution

Darren Pettifer
CFO,
National Grid Electricity Distribution
**Plenary**
- Business overview
- The RIIO-ED2 price control
- Our priorities and financial outlook

Q&A
- Coffee break

**Breakouts**
- The Future Electricity System
- Innovating for Growth
- Transforming our Region

Networking
A high-performing business
RIIO-ED1 highlights

Safety
• FY23 Lost Time Injury Frequency Rate of **0.076**

Industry leading customer satisfaction
• FY23 customer satisfaction score of **8.99** out of **10**

World class safety and strong reliability performance
• Network reliability of **99.995%**
• Average outage once every **2.5 years** for **28 minutes**

Environment
• Reduced carbon footprint **>40%** since start of ED1

Financial performance
• Excellent ROE outperformance throughout ED1
National Grid Electricity Distribution
The UK’s largest electricity distribution network operator (DNO)

~25m customers
~8m meter connections

55,500 km² service area
~225,000 km of overhead lines and underground cables

6,700 employees
~70% field

£10.8bn RAV at 31 March 2023

East Midlands
Meters: 2.7m
Area: 16,000km²

West Midlands
Meters: 2.5m
Area: 13,300km²

South Wales
Meters: 1.1m
Area: 11,800km²

South West
Meters: 1.6m
Area: 14,400km²
• Providing essential power to homes and businesses
• Working with governments and communities to understand and deliver their energy priorities
Delivering for our customers

Demand for greater electrification

Increased investment

Connect low carbon technologies

Network reinforcement

Asset health maintenance

Enabling the digital grid

Twice as many EV connections in the past 2 years than in all previous years combined

Customers could add more than a second home’s worth of demand through electric heating and EVs

Our work on asset health will see us replace 3,000km of cable in ED2

Our online EV portal enables customers to get a connection offer in 2 seconds
April 2023 – March 2028

- **Baseline allowance** for ED2
  - >30% increase in annual totex compared to ED1
- **Targeting ROE outperformance of 100-125bps**
  - Partly underpinned by synergy benefits
- **Focus on totex efficiency**
  - Also supports affordability for customers
- **Scale and scope** of ED2 markedly different to ED1
  - Increase in size and volume of capital projects
  - Supply chain efficiency
  - Comprehensive asset management capabilities required
Incentives

Distribution System Operator (DSO)

- National Grid has a deep history of complex system operation
- Already underway developing
  - New DSO and governance
  - Connections reform
  - Expanded local flexibility markets

Vulnerable Customers – leaving no one behind

- Ensuring a fair transition
- >£15m of bill savings for 24,000 customers last year
- Smart energy action plans
• Decarbonisation driving current and long-term investment
• Electricity demand forecast to double by 2050
• Increased flows on our networks driven by
  – Electrification of transport
  – Growth in domestic housing
  – Decarbonisation of heat

Sustained growth through the 2030s and beyond
Uniquely positioned as the largest electricity distribution business in the UK

Strong foundations and set up well to deliver ED2

- Strong ED1 performance to build on
- Opportunity in ED2 to outperform
  - New incentives
  - Totex outperformance
  - Long-term growth

Targeting 100-125bps ROE outperformance across ED2
Darren Pettifer
CFO, National Grid Electricity Distribution
**RIIO-ED1 vs ED2**

**Totex allowances**
- Baseline allowance for ED2: £8bn nominal\(^1\)
  - >30% nominal increase vs ED1 annual spend

**Incentives**
- Extends customer and reliability incentives from ED1
- New Distribution System Operator and Customer Vulnerability incentives

**Financial framework**
- Allowed equity return: ~5.3% indexed to risk free rates
- Debt mechanism tracks prevailing interest rates

**Uncertainty Mechanisms**
- Flex revenue for external factors and outputs delivered

---

1. Baseline allowance for RIIO-ED2 is £5.9bn in 2020/21 prices
RIIO-ED1 vs ED2

**Totex efficiency**
- A sharper focus on efficient delivery

**Updated real returns**
- Move from RPI to CPIH inflation increases cash return
- ROE adjusted annually for risk free rate
  - 1% movement in gilt rate is \(~20\text{bps}\) on ROE

**Uncertainty Mechanisms**
- 38 Uncertainty Mechanisms
  - >50% automatic
  - Includes revenue indexation for equipment and labour
  - 16 reopeners, including cyber, primary reinforcement and connections
- Forecast to represent <5% of totex
RIIO-ED2 investment

**Historic totex**
- **Opex**: 15%
- **Capex**: 85%

**£1.5bn**
FY23 totex

**Capital expenditure in ED2**
- **£7.5bn**
  - Green capex aligned to EU Taxonomy
  - >30% vs ED1

- **95%** agreed within baseline funding

**Capital Investment ED1 vs ED2 (£bn)**

1. Nominal capital expenditure, including capex funded by contributions and uncertainty mechanisms.
**New load and connections**
- Representing **10%** annual growth from FY23 levels
  - 75% demand connections: electric vehicle charging, heat pumps
  - 25% generation: solar and battery storage

**Network reinforcement**
- **>100%** increase compared to ED1
  - Projected total electricity demand increasing by 10% across our network

**Asset health and maintenance**
- **15%** increase vs ED1
  - To maintain world class reliability and enable climate resilience

**IT, digital and cyber**
- **>100%** increase vs ED1

---

1. Nominal capital expenditure, including capex funded by contributions and uncertainty mechanisms
Strong RAV Growth

UK Electricity Distribution RAV (£bn)

Estimated RAV growth

~10%

FY22-26

UK Electricity Distribution RAV growth

- At top end of 8-10% group asset growth CAGR over FY22-26

1. Compound annual growth rate as part of Group 5 year financial outlook
2. Forward years based on long run CPIH inflation assumptions
• Growth plans vital to network reliability and energy transition
• ~£100 of annual household bills
  – Holding bills flat through cost efficiencies\(^2\)
• Strong efficiency track record through ED1
  – Focused on delivering for our customers

**Targeted ROE outperformance**

100 - 125bps in RIIO-ED2

<table>
<thead>
<tr>
<th>Totex efficiency</th>
<th>Synergy benefits</th>
<th>Incentive performance</th>
</tr>
</thead>
</table>

**Split of energy bill**

- Gas transmission & distribution
- Electricity Transmission
- Electricity Distribution: ~£100
- Other charges, fees, taxes

**Typical household bill** £2,074\(^1\)

---

1. Ofgem energy price cap from 1 July 2023, for households without a pre-payment meter
2. In real terms
Driving totex efficiency

Our plan to deliver

• Targeted programme of efficiency work – rolled out and scaled up during ED2
• Capitalising on common operations structure and systems across our regions
• Data driven approach provides visibility to unit costs

Minimising Spend
Removing unnecessary spend on labour, materials and unwieldy processes

Performance Strategy
A new drumbeat on performance execution

Work scheduling
Changes to our contracts model – how we triage, organise and schedule work, and embed new technology

Expect totex efficiency to deliver 70% of operational outperformance
Driving synergies

Targeting £100m synergies over 3 years

- 1/3 from UK Electricity Distribution
- 2/3 from across the Group

**Procurement savings**
- Using broader scale of National Grid
- Saved £4m p.a. in recent High Voltage cable tender

**Asset management and maintenance**
- More condition rather than time-based maintenance
- Reduce opex whilst maintaining reliability

**Reviewing property strategy**
- Leverage shared sites and personnel
- Consolidating offices and depots through ‘Future of Work’ programme
Driving incentive performance

- Top performing network for reliability incentives
  - Targeted investment to reduce minutes lost further
- Aiming to achieve highest levels of customer satisfaction
  - At least 9.3 out of 10
  - Digital developments to better inform customers
  - Reforming connections approach
  - New customer excellence team
- New DSO and Customer Vulnerability incentives
- Further outperformance opportunity on financing
  - In addition to 100-125bps operational outperformance

Expect incentive performance to deliver

30%

of 100-125bp operational performance target
Investing for the future

- ED2 framework – better revenue adjustments for external uncertainties

- Decarbonisation driving **>30%** increase in annual investment in ED2

- ROE of at least **8.3%** across ED2
  - ~**5.3%** base return
  - **2.0%** assumed long-run CPIH inflation
  - **100-125bps** operational outperformance target

- Attractive mix of yield and growth
  - Good visibility of waves of investment over the next decade and beyond
Breakout Sessions
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Distribution System Operator

**Value Creation**
- Outperformance
  - DSO incentive is our largest
- De-risking investment
  - Optimising network, signalling new investment

**Key Functions**
- Forecasting
  - Anticipating growth
- Flexibility
  - Speeding up connections
- System Planning
  - Anticipating investment

Shaping the future direction, creating value for customers, stakeholders, and shareholders
Underpinning investment

Whole system operation
- Managing energy flows
- Responding to generation and demand
- Maximising agility and capacity

System and network planning
- Integrating renewables
- Enabling net zero for customers and communities

Flexibility markets
- Unlocking latent network capacity
- Using commercial signals

Allows us to make robust, strategic investment choices about network reinforcement
Enhancing connections

Distribution System Operator

- Best tool to anticipate significant growth in future connections
- Shifting from reactive to proactive connections
- Pushing for connections reforms through the DSO

Changes we are making in 2023

- Reforming connections queue – first ready, first connected
- Changing how Transmission and Distribution coordinate connections
- Greater flexibility for storage connections
Generation and demand will connect at different paces and in different locations. Scenario modelling will help us optimise the right level of investment, not just for here and now, but for the network of 2050.
Summary

Driving future value

Our customers
Speeding up and simplifying connections

Our business
De-risking investment, preparing for growth

The energy transition
Integrating distributed generation into our network
Innovating for growth
Breakout
Innovating for growth

Innovation plays an essential role underpinning long-term growth

• Huge projected growth across our region
• Disruptor of the Year for the second year running
• Work with stakeholders to drive innovation into the business
  – £34m invested so far in 34 Ofgem Green Recovery Schemes
  – £12m planned to deliver an additional 16 Green Recovery schemes in the next year
  – Secured backing for five new projects through Ofgem Strategic Innovation Fund

At National Grid, our groupwide ambition is to be the most innovative and pioneering energy network company in the world, with innovative mindsets and capabilities part of our DNA.
A typical 2 transformer 33/11kV AIS solution requires too much space and would be cost prohibitive.

Little space for expansion with a traditional solution requiring over 100 parking spaces.
**Case Study One: Take Charge**

**Size and scale**
- Compact design no larger than two shipping containers
- Factory built and assembled by Brush Transformers in Loughborough
- Modular solution, which can be added to over time

**Installation**
- Plug and play solution
- Installed in just two days

Delivered over 10x increase in EV charging capacity, with more to come
“National Grid’s Take Charge project could be a game changer for Moto if it’s rolled out across the UK. This innovative solution will allow us to deploy the biggest EV charging network on the UK’s motorways through access to sufficient electricity supplies.

At Moto we are transforming the EV charging experience with more than 1,650 ultra rapid EV chargers currently being rolled out at our service areas over the coming 6-7 years, with more than 350 chargers already in place.

This partnership with National Grid will support Moto in that mission and help us to deliver way above and beyond the Government’s target of six rapid chargers at each motorway service site by the end of 2023.”

Ken McMeikan Chief Executive Officer, Moto
CASE STUDY ONE
Take Charge

- Scalable solution with wide range of use cases
  - HGVs, seaports, airports and other locations with high future electricity demand
- Strengthening our relationship with strategic supply chain partners
- Further reducing the footprint, cost and time for installation

Supporting the delivery of a clean, fair and affordable energy future
- 600,000 additional heat pumps installed by 2028
- Heat pumps commonplace in commercial settings today (climate control) but few and far between in domestic properties
- ~50% of the UKs energy demand is for heating
- The electricity distribution network was originally sized to meet ~20% of overall energy demand
- Heat pumps require around 2.5x the electricity required by an EV charger

Preparing for heat pumps will require significant reinforcement, and new ways of managing energy flows
• **What is EQUINOX?** A system solution that will test new commercial and technical arrangements for households with heat pumps who temporarily reduce electricity usage.

• **What is the problem we’re solving?** Enable DNOs to unlock flexibility from residential electric heat pumps reliably and cost-effectively - EQUINOX will be the first to achieve this.

• **Who is it funded by?** EQUINOX is funded through Ofgem’s Network Innovation Competition (NIC).

• **Who is involved?** EQUINOX is led by National Grid, with support from Octopus Energy, Passiv UK, Sero, SP Energy Networks, Welsh Government, West Midlands Combined Authority, National Energy Action, Scottish Power Energy Retail, and Guidehouse.
• Strong engagement and take-up in first trial
• 99% customer satisfaction from those who took part
• Achieved average of 420kWh turndown per event
• Individual customers achieved ~1.5 kWh turndown per event

Preparing for winter 2023/24 trials to further increase participation and reduce post event demand peak
Transforming our region
Breakout
Transforming our region

Relationships are an essential tool to unlock growth and transform the region

- Government mandated regional approach to energy planning, with local authorities required to develop detailed Local Area Energy Plans (LAEP)

- Customer expectations of engaging with business have significantly changed
  - Digital solutions, 24hr engagement, instant online decisions

- Society's expectations of business have also changed drastically
  - Businesses need to demonstrate they are responsible, engaged, and an active member of the communities they serve

*It is our relationships with these key groups that give us our licence to operate*
Local authority engagement

We are working with all 124 local planning authorities in our region.
Collaborating with local authorities in Leicestershire to build detailed energy plans.

Original forecast using historic data and top down projections:

76,000 EVs

Improved forecast after collaboration and support from NGED:

112,000 EVs

A 47% increase

Supporting the case for £5 million investment in RIIO-ED2.
Local authority engagement

- Leicestershire demonstrates the potential of proactive engagement.

- Scaling this up will create 124 high quality LAEPs
- Giving greater clarity and confidence on network growth and investment required

These plans will allow us to build the smart, two-way network of the future
Exponential demand growth over the last five years

- EV charger connection requests is largest share of this growth
- More EVs connected to the network in the last two years than in all previous years combined
- 13% increase in demand for new connections in the last 12 months
Connecting our customers

**EV Charger Online Tool**
Our domestic EV charger online application tool allows customers to apply for, and receive, an instant response to their application. Through FY24, we’ll enhance this to include other domestic Low Carbon Technologies.

**Low Voltage Online Tool**
Our low voltage (LV) online budget estimate tool allows customers to obtain an instant quotation (e.g. domestic solar, new housing connections). Through FY24, we’ll enhance this to include firm low voltage offers.

**Online Customer Portal**
For those with accepted offers, our online customer portal is now live. Customers can create an account and manage and accept quotations, make payments and track job progress.
Connecting our customers

Digitalisation and self-serve is the future:
**Better:** Improves customer experience
**Quicker:** Speeds up connection times
**Efficient:** Reduces costs on the business
**Scalable:** Responds >2,000 enquiries per day

Domestic EV self-serve application

Choose your journey
Tell us about your equipment
Tell us about you
Get your self-serve decision
Investing in communities: the aim

- Show up locally as a responsible business
- Build trust with customers
- Maintain our ‘social licence to operate’
Investing in communities: the pilot

Inclusive community engagement

National Grid colleagues worked in partnership with school and community stakeholders to achieve key pilot outcomes:

- A 19kW solar array at the school – generating ~17,000kWh per year
- 120 students engaged on STEM careers and the role of National Grid
- The development of an innovative ‘citizen science’ model for quantifying biodiversity net gain
- A social return on investment (SROI) of £3.74 over and above every £1 spent, over 10 years
We are investing more than **£2.5m** in community solar to transform the region

- Community solar installations on >100 schools
- Supporting communities in areas of high economic deprivation to unlock the benefits of net zero
- Engaging students early and building National Grid’s talent pipeline
- Working in partnership with experts to accelerate project roll-out, maximise impact, and reduce costs

**Developing strong community relationships, building trust, and adding value**