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# Energy White Paper – review of key points

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# Talking to you today

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# Poll Questions

For each of the poll themes / questions, you will be given a choice of four answers.

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- Achieving 40GW by 2030 is a challenge – but the industry can meet it.
    - What are the key obstacles to meeting this goal?
  - Can Britain deliver CCUS at scale?
    - What are the key obstacles to delivering CCUS at scale?
  - Will we the consumers do our bit?
    - Net Zero needs all of us to “change our ways”. What is the biggest challenge?
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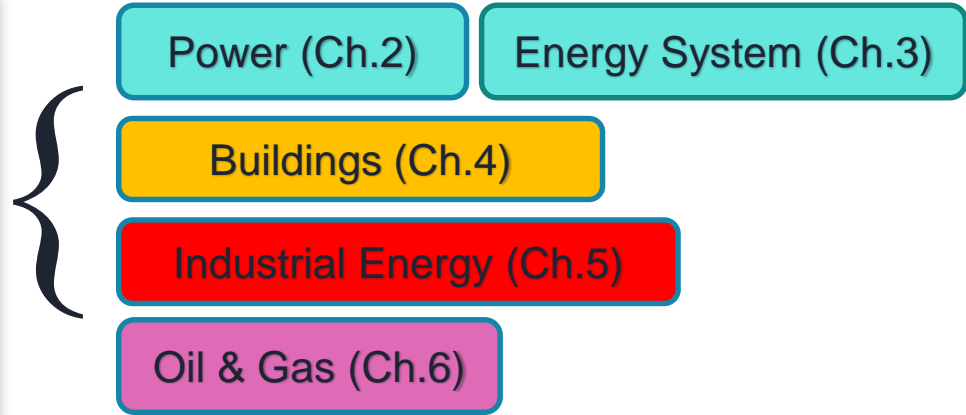
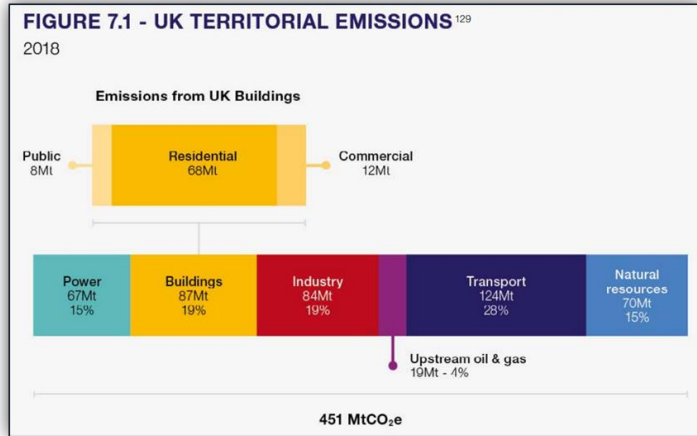
# White Paper initiatives (& Scottish initiatives)



Timing	Topic
Accompanying	<a href="#">Consultation on Bringing Forward Coal Closure Date</a>
Accompanying	<a href="#">Electricity System Analysis</a>
Accompanying	<a href="#">Response to Consultation on RAB Model for New Nuclear</a>
Accompanying	<a href="#">Call for Evidence on Future of Renewable Support Schemes</a>
Accompanying	<a href="#">Report on Impact of Interconnectors on Decarbonisation</a>
Accompanying	<a href="#">Proposals for Helping Develop Decommissioning Opportunities</a>
As soon as possible	Roadmap to Future Homes Strategy
Shortly	Consultation on Use of Fuels produced from Non-Biogenic Waste
December 2020	<a href="#">Interim Report of HM Treasury Review on Funding Net Zero</a>
Early 2021	National Bus Strategy
Early 2021	Heat and Buildings Strategy
Early 2021	Hydrogen Strategy
Early 2021	Updated Fuel Poverty Strategy for England
Early 2021	Government Response on Consultation on Green Gas Levy Design

Early 2021	Conclusions on Review of Oil & Gas Licensing Regime
Spring 2021	Transport Decarbonisation Plan
Spring 2021	Industrial Decarbonisation Strategy
Spring 2021	Energy Data and Digitalisation Strategy
Spring 2021	Ofgem Final Decision on Implementing Half-Hourly Settlement
Spring 2021	Smart Systems Plan
Spring 2021	Green Jobs Taskforce Action Plan
By April 2021	Call for Evidence on Affordability and Fairness
By summer 2021	Principles for Smart Appliances
Summer 2021	Final Recommendations of Union Connectivity Review
2021	Government Response to Consultation on Clean Heat Grant
2022	Biomass Strategy
Not stated	Draft Downstream Oil Resilience Bill

# Structure (and limits) of White Paper



Consumers (Ch.1)

Transport Decarbonisation Strategy in Spring 2021

A close-up photograph of a hand placing a puzzle piece into a larger puzzle. The puzzle pieces are dark blue and the background is a lighter blue gradient. The hand is positioned at the top, and the puzzle piece being placed is in the center. The lighting is dramatic, highlighting the texture of the puzzle pieces and the skin of the hand.

# Excerpts from the White Paper

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- **Consumers**

- Affordability and fairness (call for evidence, Spring 21)
  - Switching and tariffs
    - Opt-in switching framework (March 21)
    - Auto-renewals / roll-overs / opt-out switching (March 21)
  - Market framework
    - Changes to support innovative tariffs and products
    - Consumer information on green tariffs (Early 21)
    - Regulation of wider market (including TPIs) (Spring 21)
    - Regulation of smart appliances (linked to DCMS steps)
  - Social obligations
    - Removal of ECO and WHD thresholds
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# Excerpts from the White Paper (2)

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- **Power**

- Offshore wind
  - 40GW by 2030 (CFD call for evidence)
  - UK content / manufacturing
- Onshore wind / marine
  - Ministerial Delivery Group
- Power CCUS / BECCS
  - deployment / commercial framework
- Nuclear
  - projects and R&D; fusion
- Planning
  - NPS review







# Excerpts from the White Paper (3)

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- **Energy Systems**
    - Storage and flexibility
      - new Smart Systems Plan; definition of storage
    - Networks
      - Competition in T (and D) networks
      - 18GW by 2030 new I/Cs; island connections
      - EV charging grid for strategic road network
    - Digital infrastructure
      - Energy Data Strategy; energy data catalogue
    - Role of natural gas
    - Institutions and governance
      - T&D system operation; codes
      - New S&PS for Ofgem
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# Excerpts from the White Paper (4)

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- **Industrial Energy**

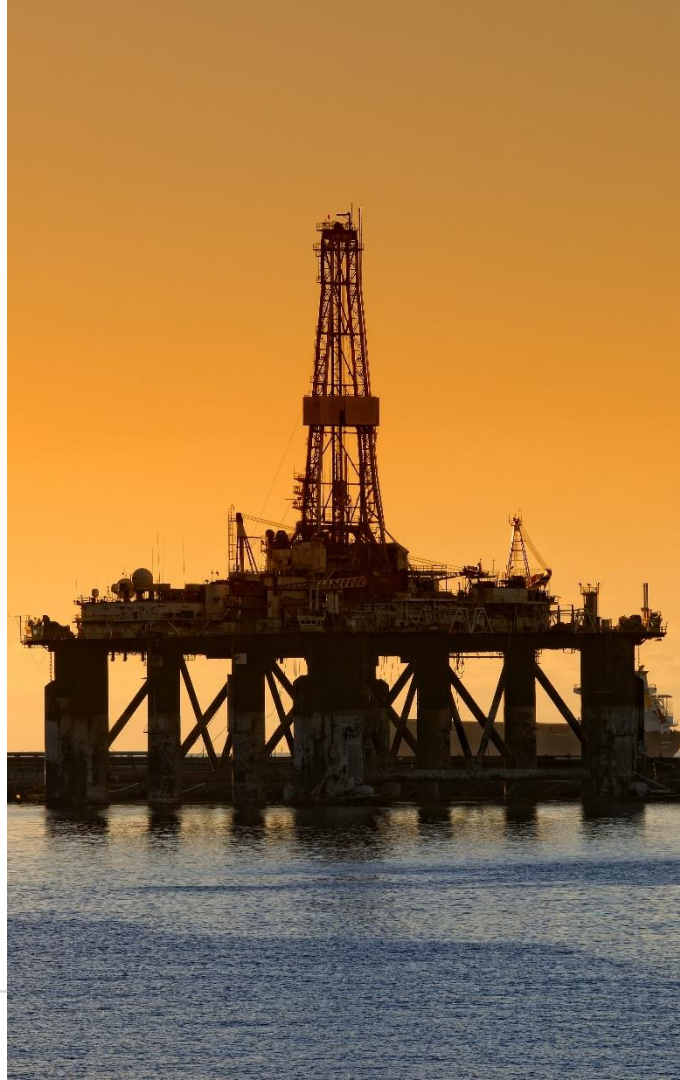
- Industrial Decarbonisation Strategy (Spring 21)
    - Industrial Clusters Mission
    - Four LCCs by 2030; one fully NZC by 2040
  - Industrial CCUS
    - Capturing 10MtCO<sub>2</sub> by 2030
    - New commercial framework by 2022
  - Clean hydrogen
    - Hydrogen Strategy (Spring 21)
  - Revenue mechanism for CCUS / hydrogen etc
    - Details later in 2021
  - UK (Net Zero) ETS
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# Excerpts from the White Paper (5)

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- **Oil & Gas**

- UKCS net zero by 2050
    - Platform electrification
    - Zero flaring / venting by 2030
  - Repurposing UKCS infrastructure
    - Carbon transportation and storage
  - North Sea Transition Deal (H1 2021)
    - Support delivery of CCUS / hydrogen
    - Diversification of supply chain / exporting expertise
  - Changes to the regulatory regime to incentivise switch to clean energy
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# **Theme 1.** *Achieving 40GW by 2030 is a challenge – but the industry can meet it.*

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- **Poll questions.**
  - What are the key obstacles to meeting this goal?
    - Planning and consenting.
    - CfD/ route to market.
    - Supply chain capacity.
    - Availability of sites.
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## Theme 2. *Can Britain deliver CCUS at scale?*

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- **Poll questions.**
  - What are the key obstacles to delivering CCUS at scale?
    - Technology, especially “capture”.
    - Government support for investment.
    - Skills and supply chain.
    - Public concerns.
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## Theme 3. *Will we the consumers do our bit?*

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- **Poll questions.**
  - Net Zero needs all of us to “change our ways”. What is the biggest challenge?
    - Affordability (of, e.g., energy / transport tariffs)
    - Fairness (as between different user groups)
    - Trust (in government, technology and/or markets)
    - Self-interest (attachment to convenience)
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