GB Winter Outlook Consultation 2012/13 (Gas & Electricity)

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Electricity Operational Forum – August 2012
Agenda

- GB Gas Overview 2012/13
- GB Electricity Overview 2012/13
- Summary
Published 10th July 2012 – Consultation on Analysis

Consultation period ends Friday 17th August 2012

https://www.nationalgrid.com/uk/Electricity/SYS/WinterOutlook/
GB – Winter 2012/13 Gas Outlook

- Gas Demand build up – note the range between “warm” and “cold” demand
GB – Winter 2012/13 Gas Outlook

- Storage capacity marginally increasing
- Various sources for gas supply hence ranges quoted

<table>
<thead>
<tr>
<th>(mcm/d)</th>
<th>2011/12 Range</th>
<th>2011/12 Top 100</th>
<th>2011/12 Highest</th>
<th>2012/13 Range</th>
<th>2012/13 400+</th>
</tr>
</thead>
<tbody>
<tr>
<td>UKCS</td>
<td>106-132</td>
<td>113</td>
<td>137</td>
<td>96 – 137</td>
<td>123</td>
</tr>
<tr>
<td>Norway</td>
<td>70-118</td>
<td>103</td>
<td>127</td>
<td>70 - 115</td>
<td>105</td>
</tr>
<tr>
<td>BBL</td>
<td>24-36</td>
<td>25</td>
<td>35</td>
<td>24 - 36</td>
<td>30</td>
</tr>
<tr>
<td>IUK</td>
<td>0 – 30</td>
<td>0.3</td>
<td>10</td>
<td>0 – 30</td>
<td>20</td>
</tr>
<tr>
<td>LNG Imports</td>
<td>50 – 110</td>
<td>48</td>
<td>86</td>
<td>30 – 100</td>
<td>80</td>
</tr>
<tr>
<td>Total</td>
<td>250 – 426</td>
<td>289</td>
<td>327</td>
<td>220 - 421</td>
<td>358</td>
</tr>
<tr>
<td>Total inc. Storage</td>
<td>328 - 529</td>
<td>466</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

\(^{14}\) Source: Gas Facilities Limited

\(^{15}\) Source: National Grid
GB – Winter 2012/13 Electricity Outlook
GB – Winter 2012/13 Electricity Outlook

- Demands similar to last year

![Graph showing weekly peak demand with lines for different scenarios].

Legend:
- Green line: Last Winter’s Actual Demand Corrected to Normal Weather
- Blue line: Last Winter’s Actual Demand
- Red line: Forecast Demand based on Normal Weather
GB – Winter 2012/13 Electricity Outlook

- Generation supply capacity (79.6 GW)
- Forecast Surplus 18% (*Winter 2011/12 was 16%*)
Coal generation is forecast to run baseload ahead of gas generation.
GB – Winter 2012/13 Electricity Outlook

- Able to maintain exports on Interconnectors to Europe except under certain weeks with 1 in 20 demands
The key risks to the electricity forecast surpluses being lower than forecast are:

- Normal demand being higher than forecast
- Weather being colder than 1 in 20
- Availability losses being higher than assumed
- Uncertain timing of LCPD plant closures
- An increase in the volume of mothballed plant.
GB Summary

- **Gas**
  - Little change in winter demand forecast for 2012/13 with gas for power generation expected to remain low.
  - 2012/13 supply forecasts – both LNG and Continent uncertain and subject to demand / prices, some additional (flexible) storage expected.

- **Electricity**
  - Surpluses allow for maximum exports to Europe except under 1 in 20 demand conditions

- Please provide feedback on analysis by Friday 17th August to energy.operations@nationalgrid.com