

Preliminary Winter Outlook 2009/10

Electricity Operational Forum – August 2009

Energy Requirements Team

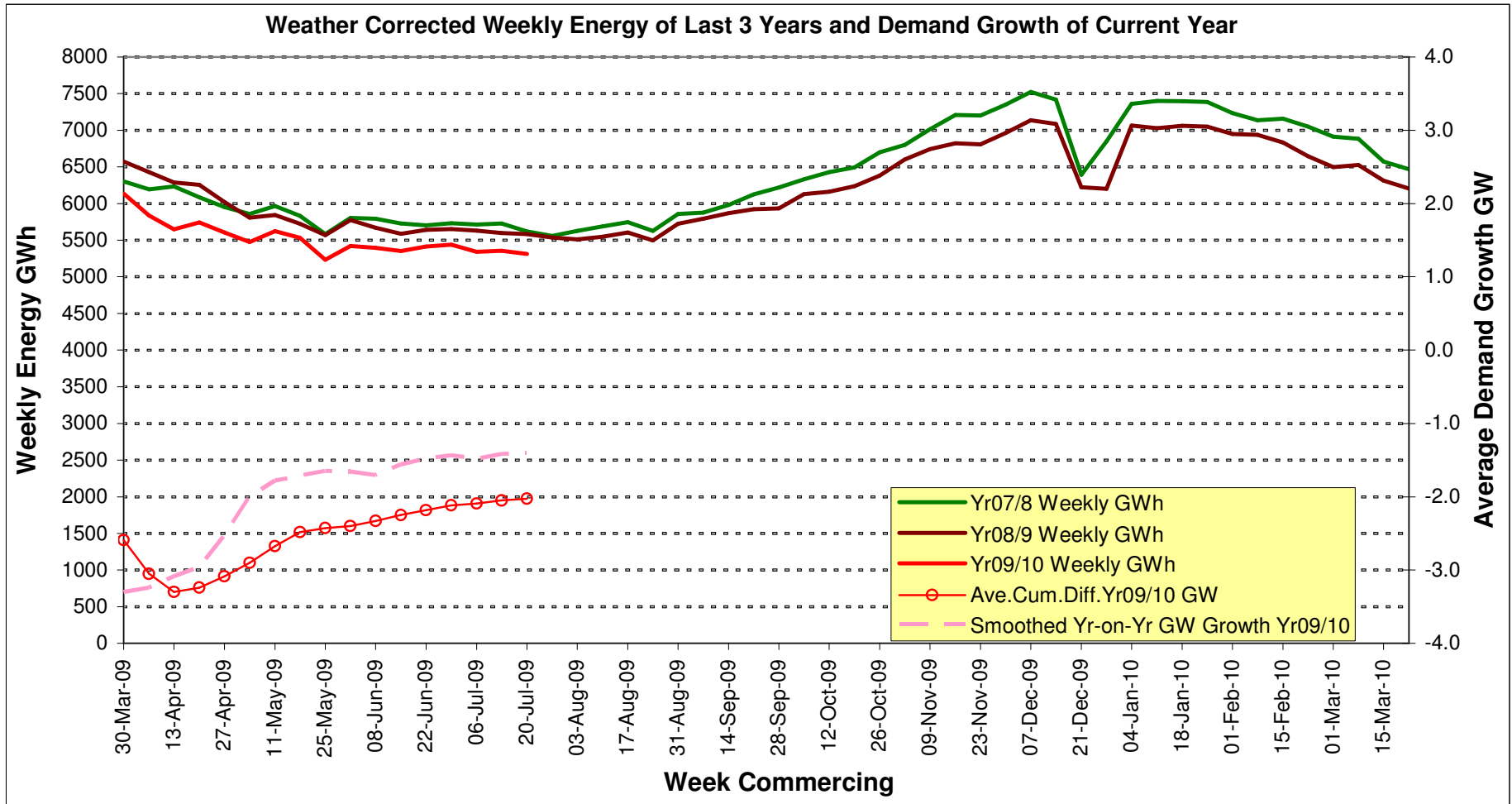
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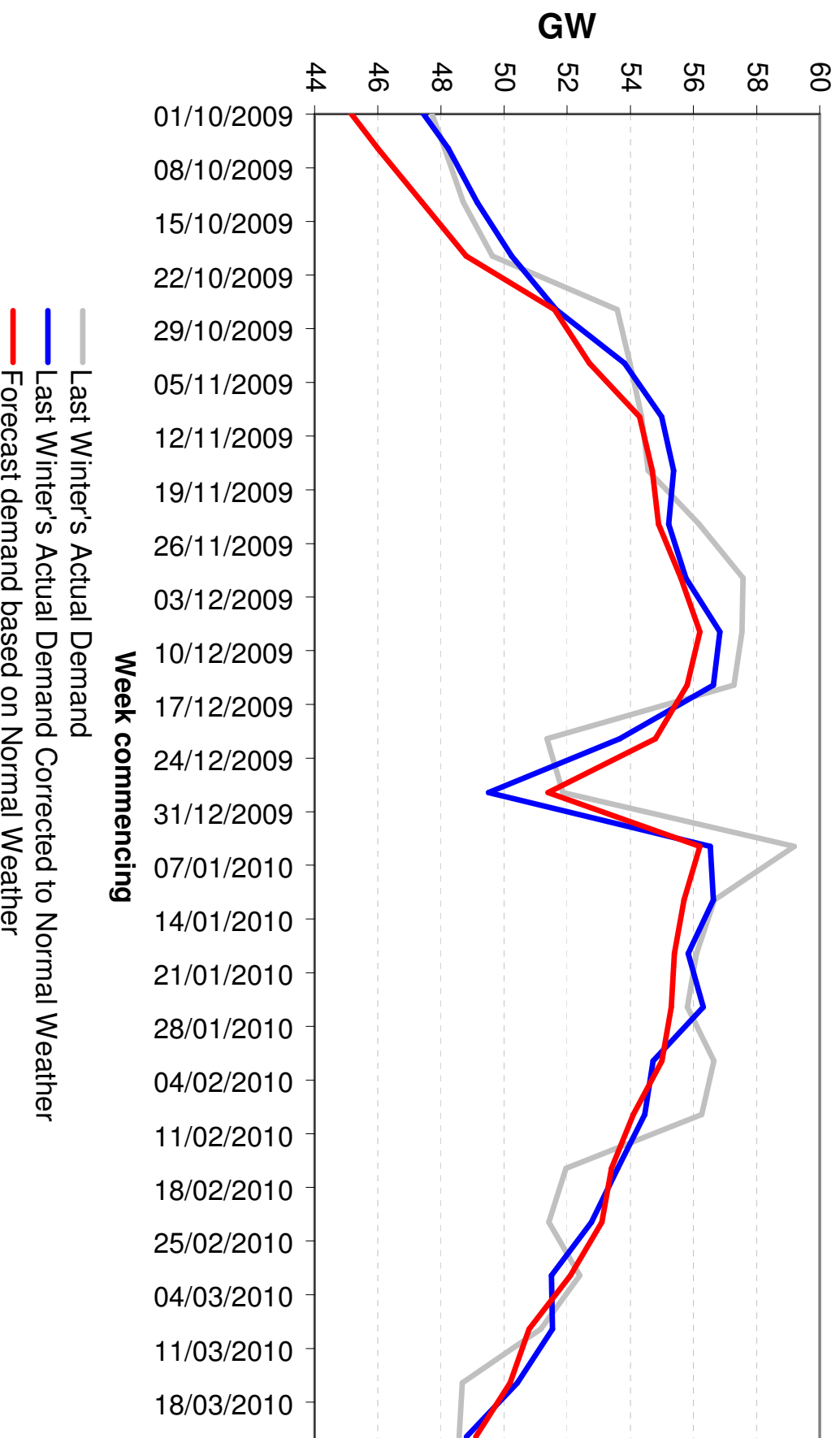
Winter!



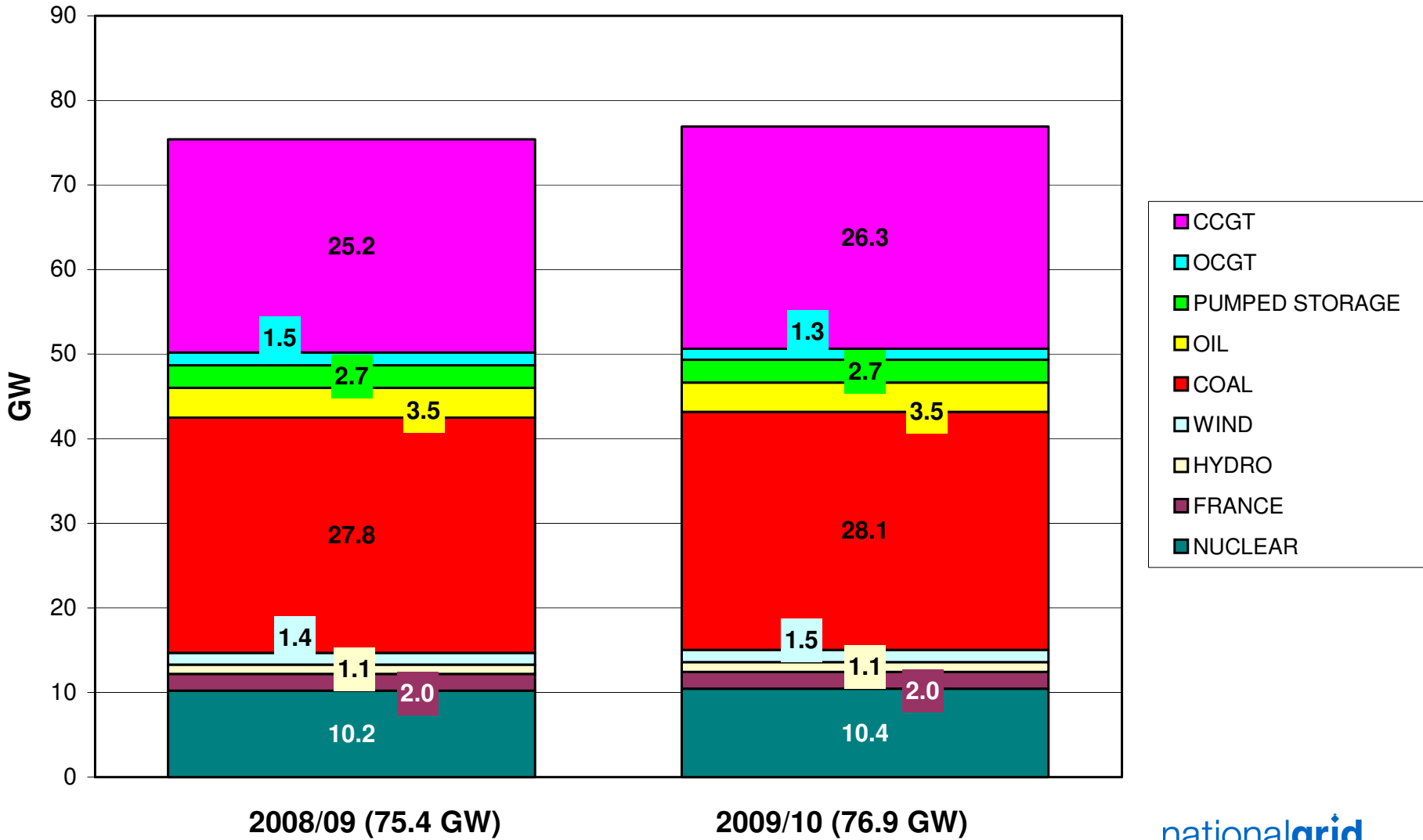
Demand Forecast Uncertainty has Increased



Winter 2009/10 Forecast Demand



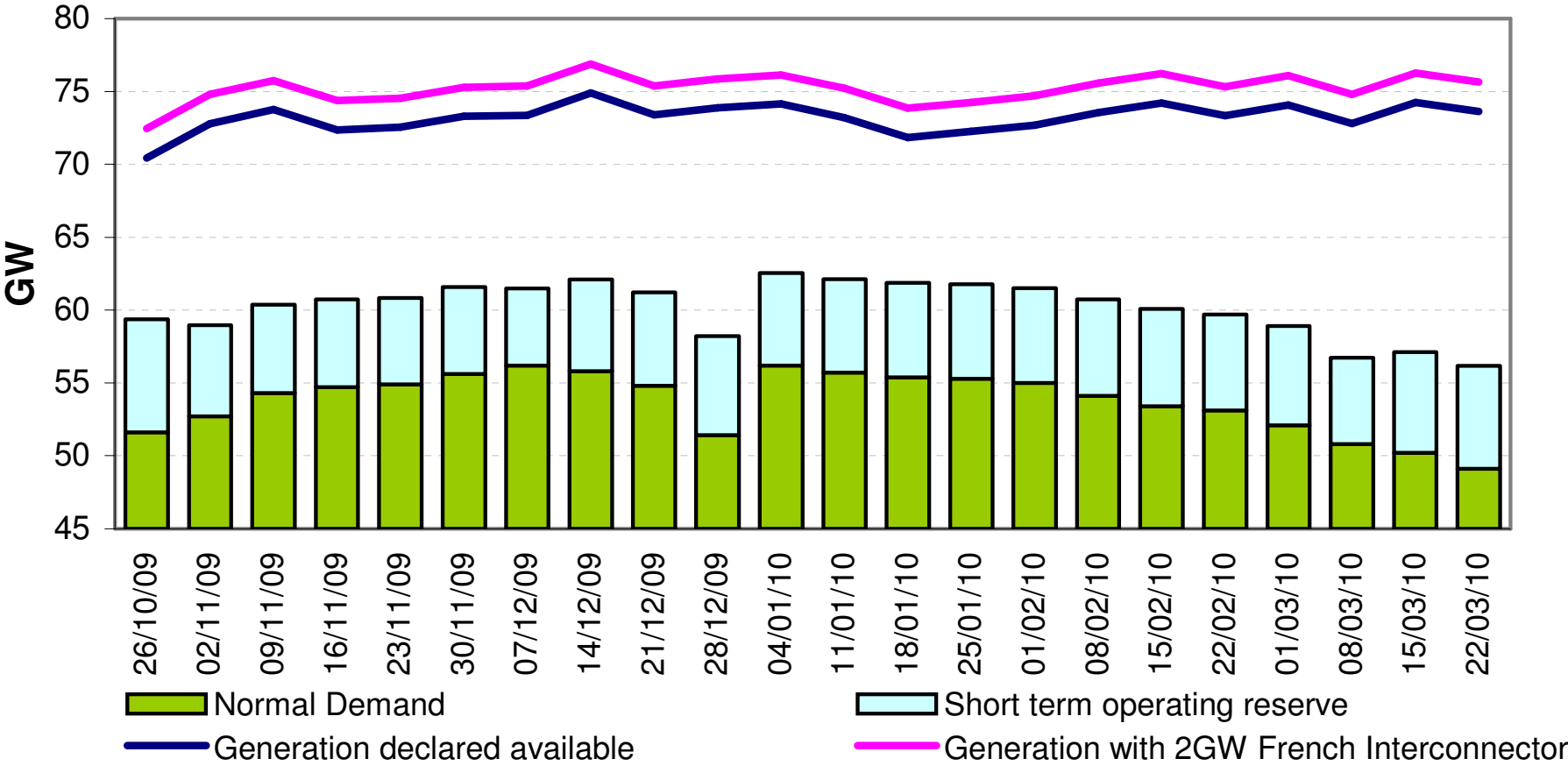
Generation Mix Winter 2009/10



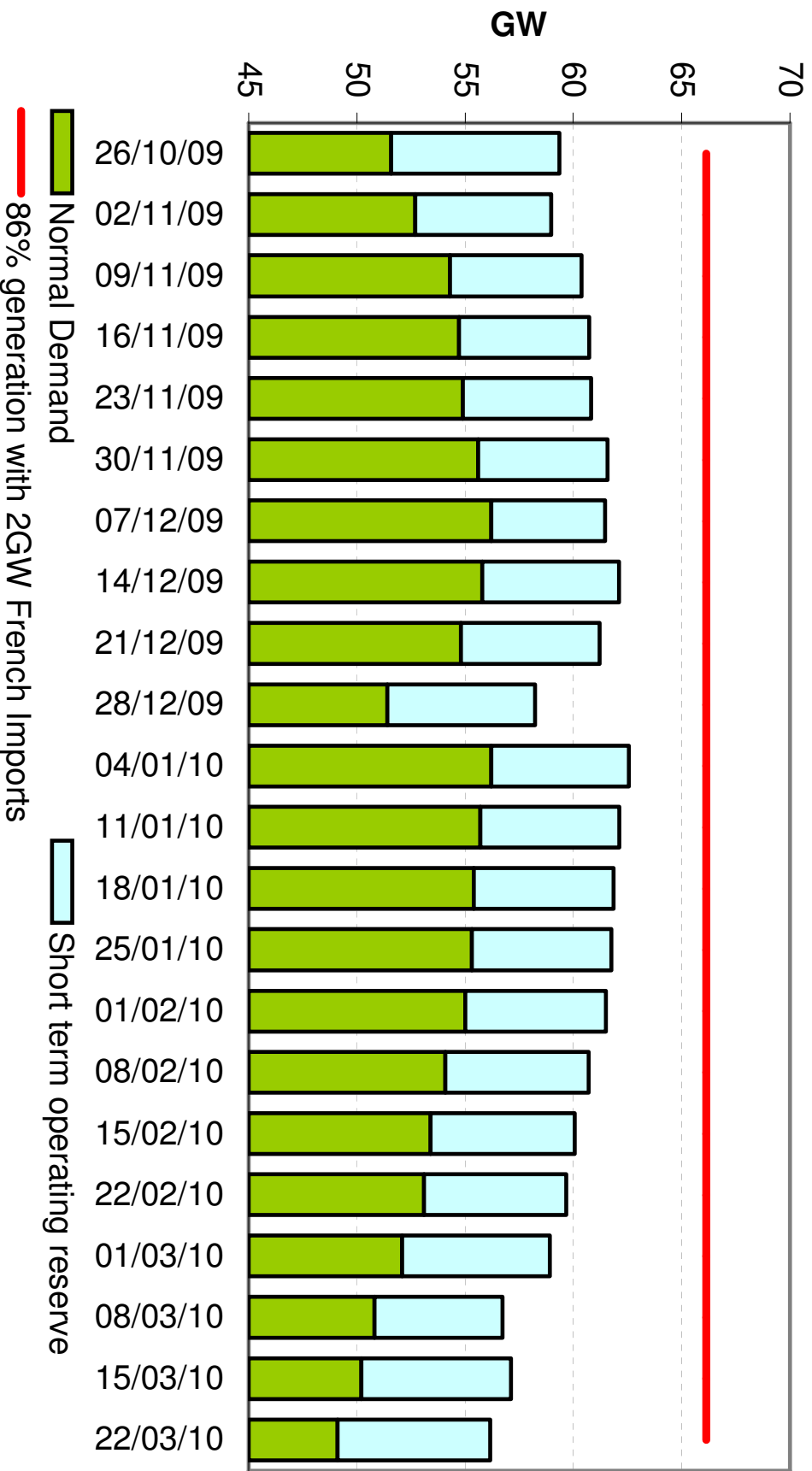
Assumed Availability

Power Station Type	Full Metered Capacity (GW)	Assumed Availability	Assumed Availability (GW)
Nuclear	10.4	80%	8.4
French Interconnector	2.0	100%	2.0
Hydro generation	1.1	60%	0.7
Wind generation	1.5	27%	0.4
Coal	28.1	85%	23.9
Oil	3.4	95%	3.3
Pumped storage	2.7	95%	2.6
OCGT	1.3	95%	1.2
CCGT	26.2	90%	23.6
Total	76.9		66.0
Average availability		86%	

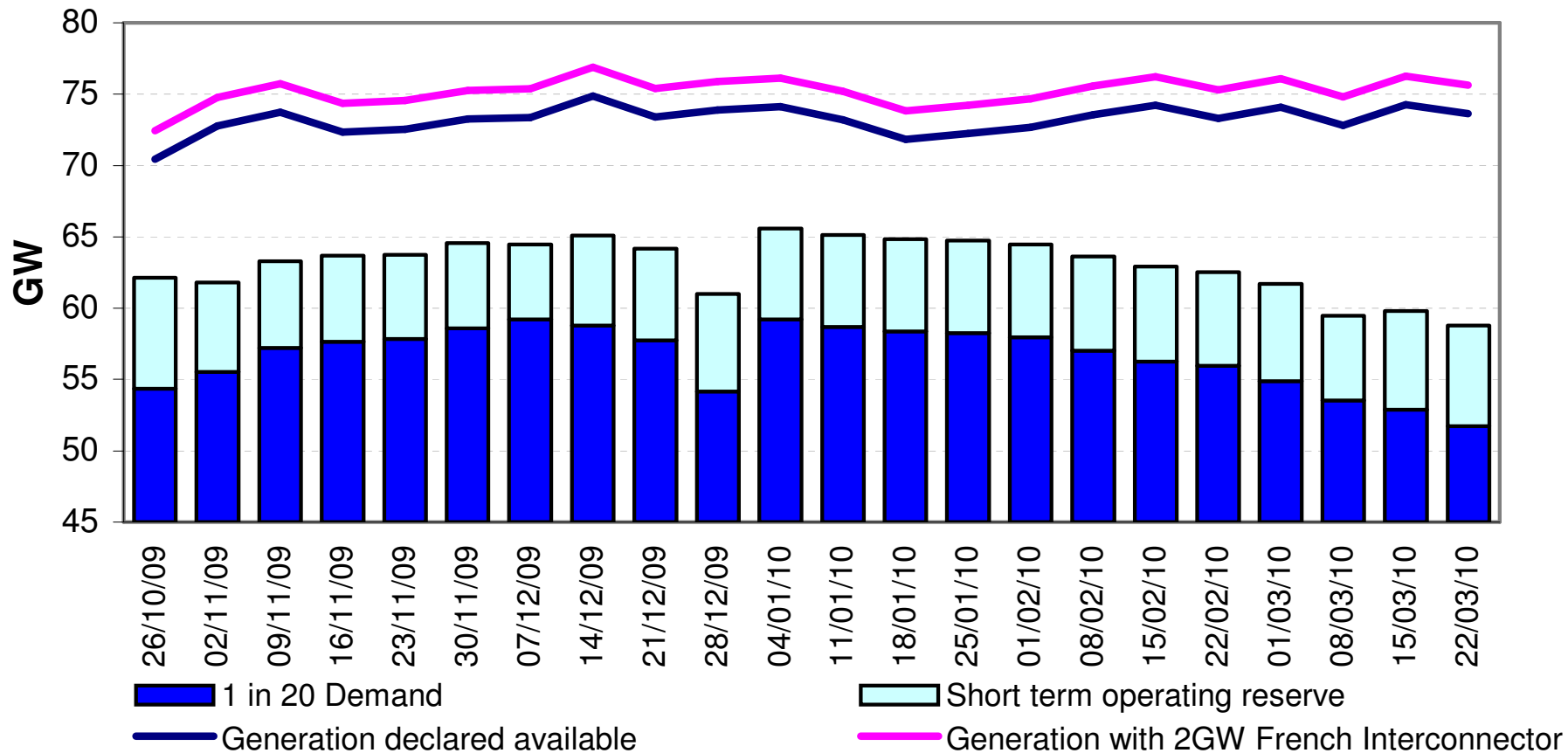
Normal Demand and Notified Generation Availability



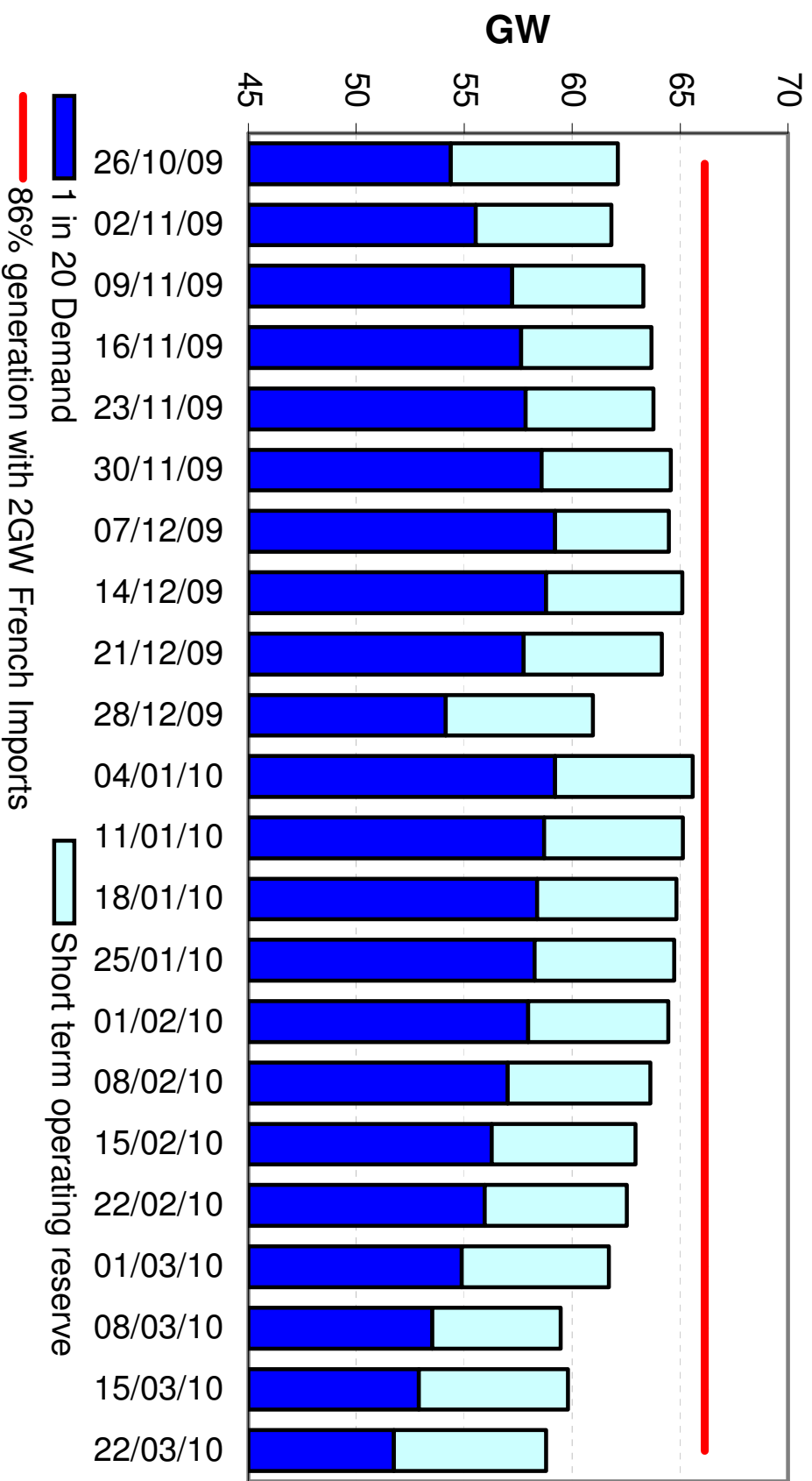
Normal Demand and Assumed Generation Availability



1 in 20 Demand and Notified Generation Availability



1 in 20 Demand and Assumed Generation Availability



Looking ahead to Winter 2009/10 - Summary

- ◆ **The overall electricity demand/supply balance for winter to come looks comfortable at this stage**
 - ◆ The potential we saw for last winter (pre recession) for a larger than usual number of system warnings being issued if we had 1 in 20 cold weather has gone away
- ◆ **Electricity demands are expected to be much lower (2 GW) than a pre-recession winter**
- ◆ **There is significant upside in generation availability with a number of CCGTs expected to start commissioning**

Information on demands, generation surpluses and other operational information is regularly updated (outside of the outlook report cycle) and can be found on www.bmreports.com

Winter outlook 2009/10 timeline

Preliminary report published - 30th June 2008

- ◆ Invites views on key issues and assumptions made for 2009/10;
- ◆ <http://www.nationalgrid.com/uk/Electricity/SYS/outlook/>

Winter Outlook Ofgem Seminar – TBA W/C 7th September 2009;

Consultation responses - 11th September 2009;

Final winter report published - w/c 28th September 2009.