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

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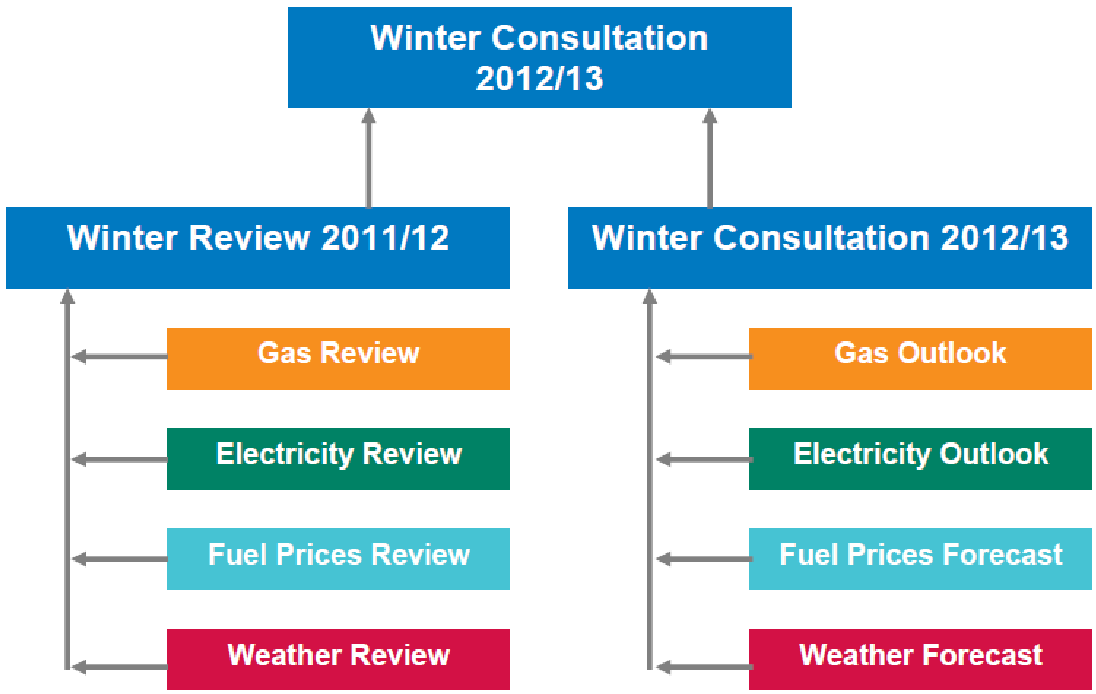
Electricity Operational Forum – August 2012

Agenda

- GB Gas Overview 2012/13
- GB Electricity Overview 2012/13
- Summary

Document Structure & Process

- Published 10th July 2012 – Consultation on Analysis



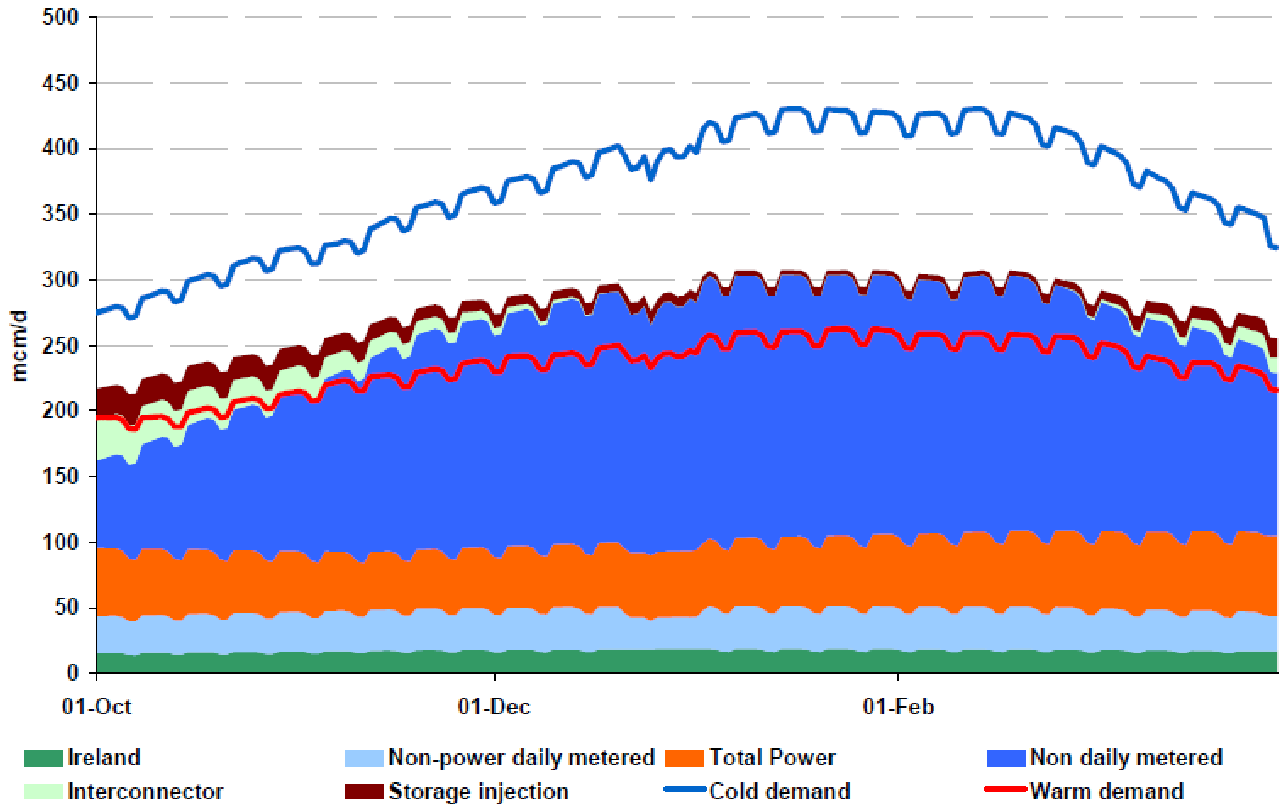
- Consultation period ends Friday 17th August 2012

https://www.nationalgrid.com/uk/Electricity/SYS/WinterOutlook/

GB – Winter 2012/13 Gas Outlook

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

(mcm/d)	2011/12 Range	2011/12 Top 100	2011/12 Highest	2012/13 Range	2012/13 400+
UKCS	106-132	113	137	96 – 137	123
Norway	70-118	103	127	70 - 115	105
BBL	24-36	25	35	24 - 36	30
IUK	0 – 30	0.3	10	0 – 30	20
LNG Imports	50 – 110	48	86	30 – 100	80
Total	**250 – 426**	**289**	**327**[14]	**220 - 421**	**358**
Total inc. Storage[15]				**328 - 529**	**466**

GB – Winter 2012/13 Electricity Outlook

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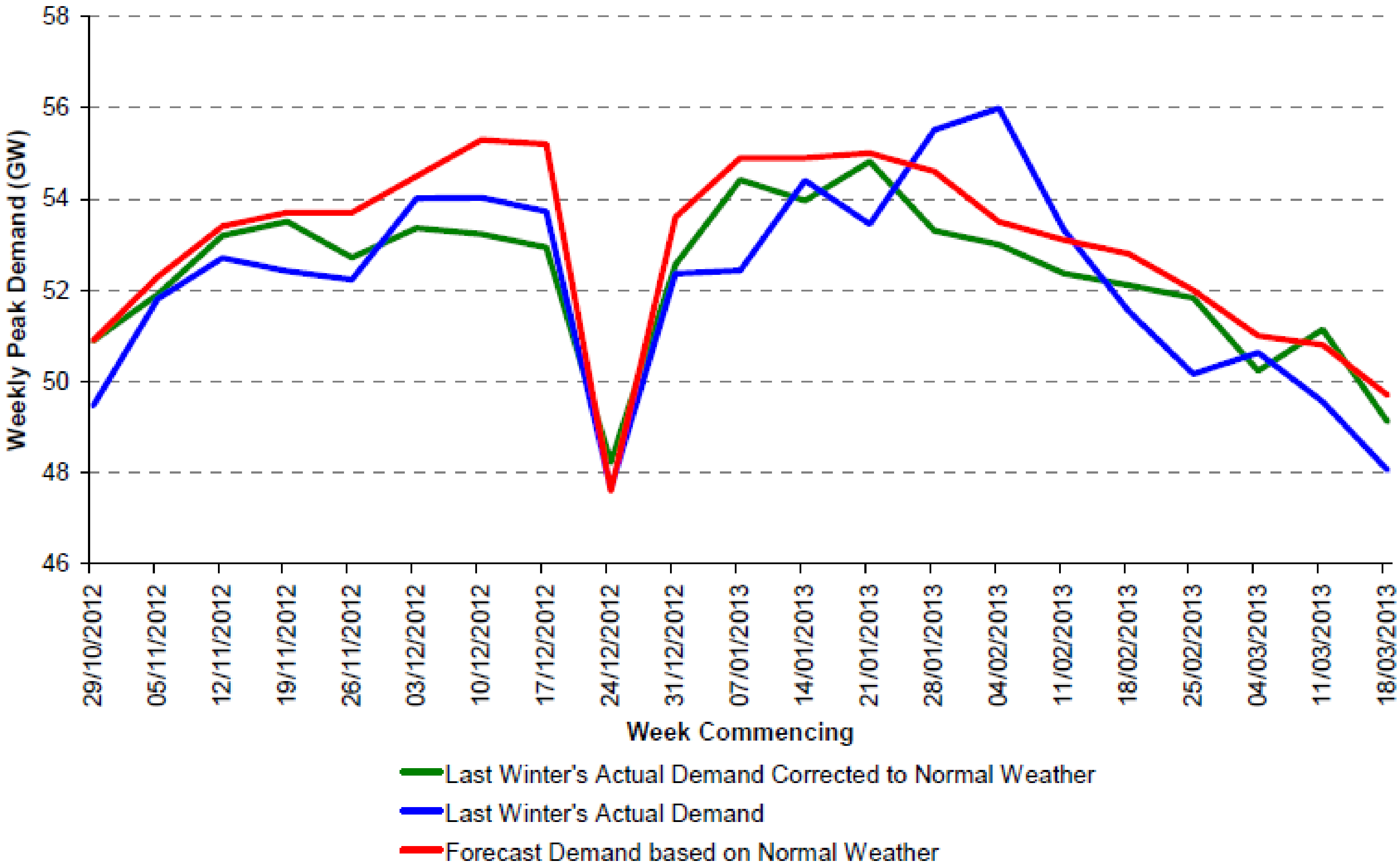
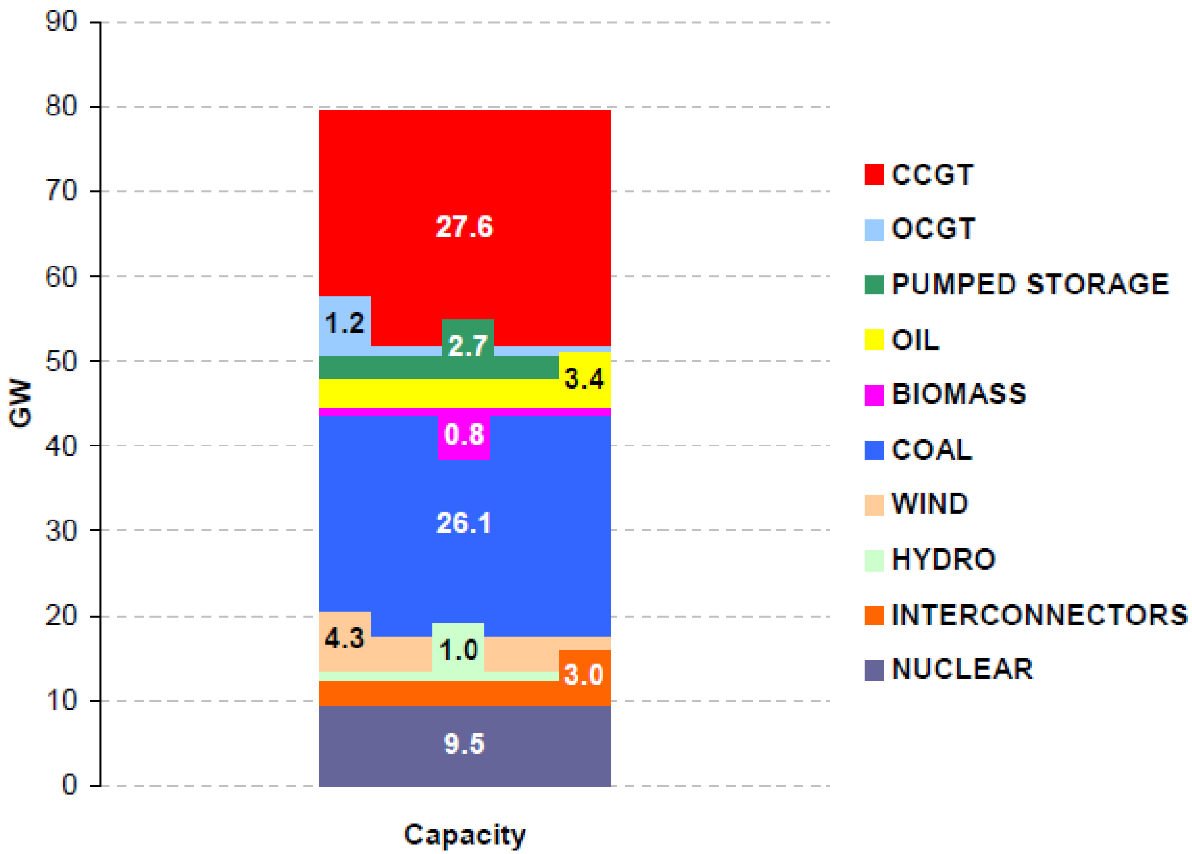
GB – Winter 2012/13 Electricity Outlook

- Demands similar to last year



GB – Winter 2012/13 Electricity Outlook

- Generation supply capacity (79.6 GW)
  - Forecast Surplus 18% (*Winter 2011/12 was 16%*)



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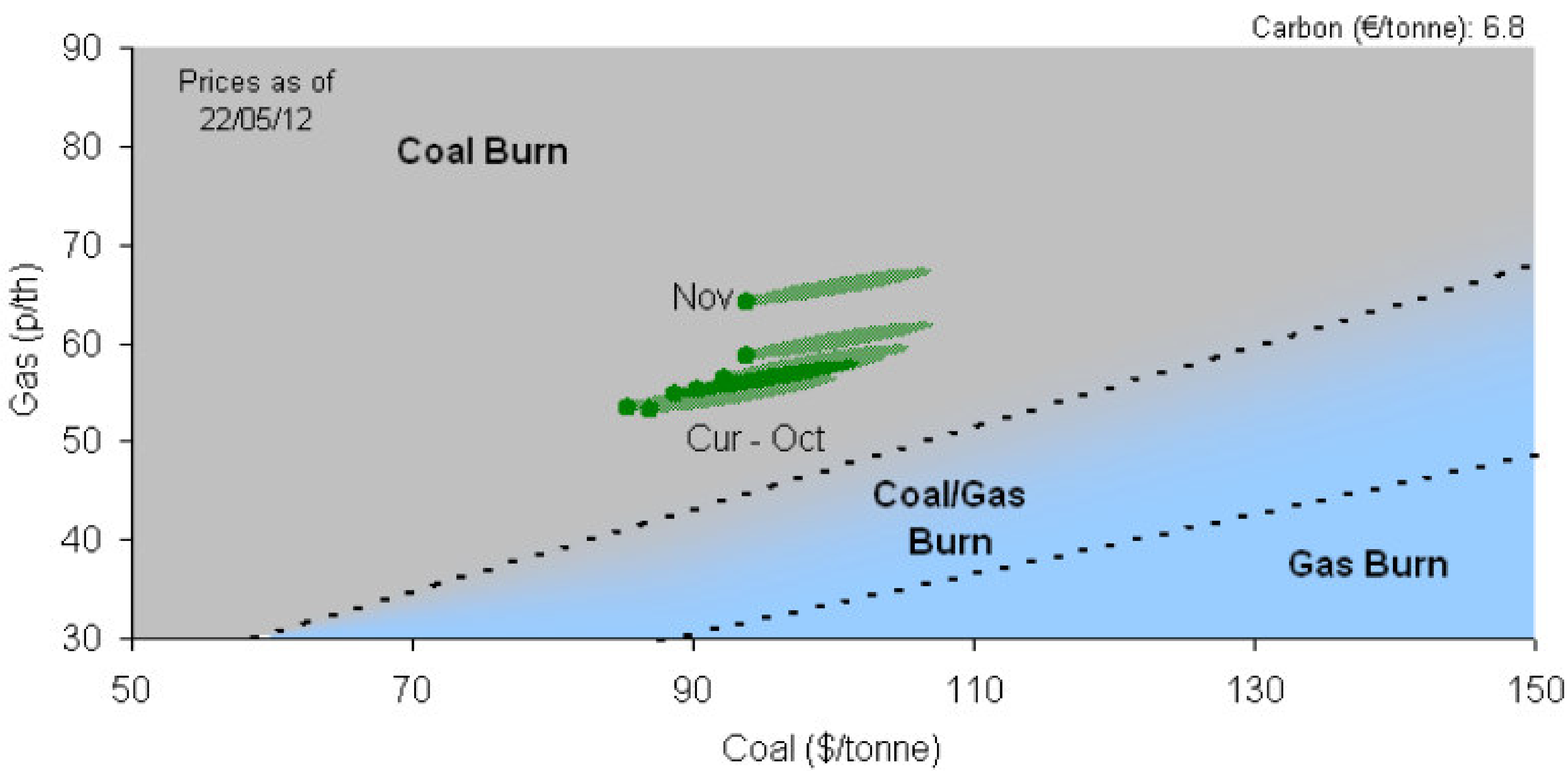
GB – Winter 2012/13 Electricity Outlook

- Coal generation is forecast to run baseload ahead of gas generation



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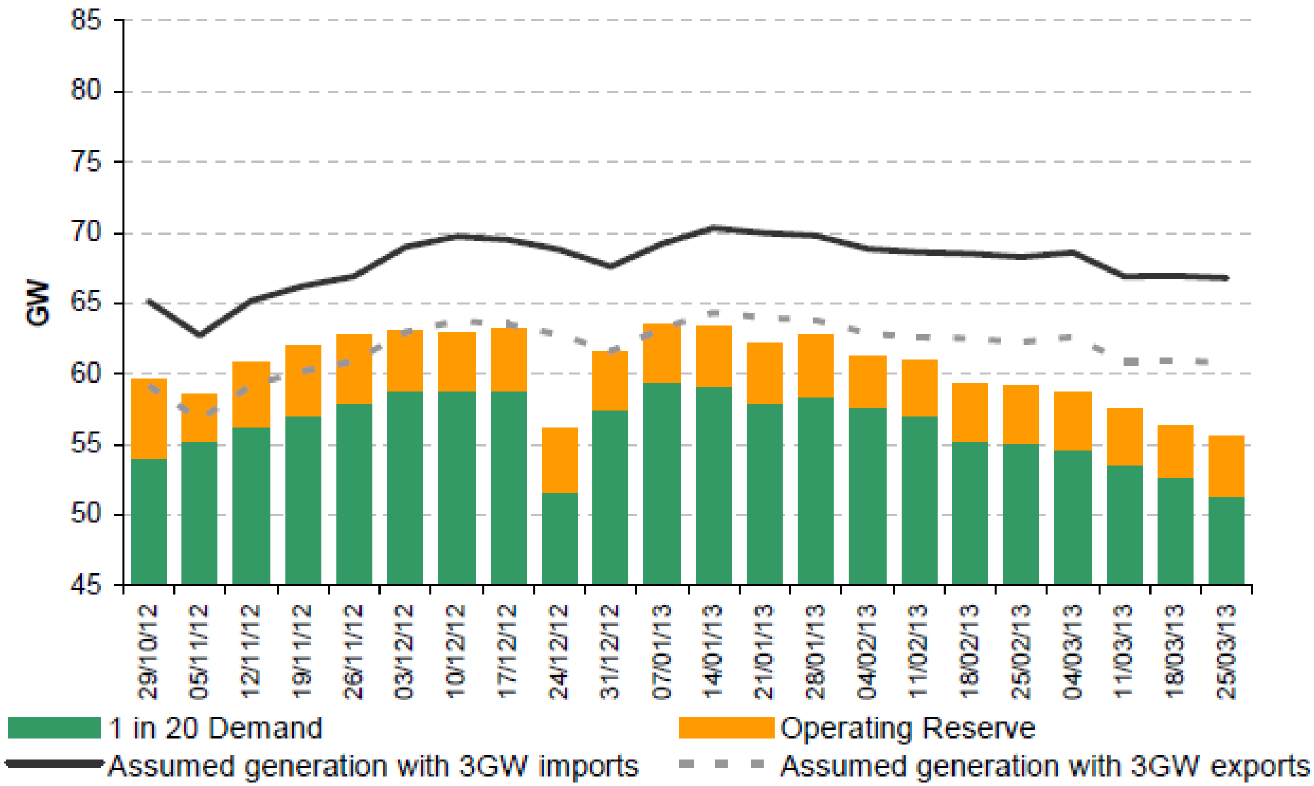
GB – Winter 2012/13 Electricity Outlook

- Able to maintain exports on Interconnectors to Europe except under certain weeks with 1 in 20 demands



GB – Winter 2012/13 Electricity Outlook

- 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**