

Winter Update

Electricity Operational Forum 24th February 2009

Stuart Bailey

nationalgrid

The power of action.™

Weather

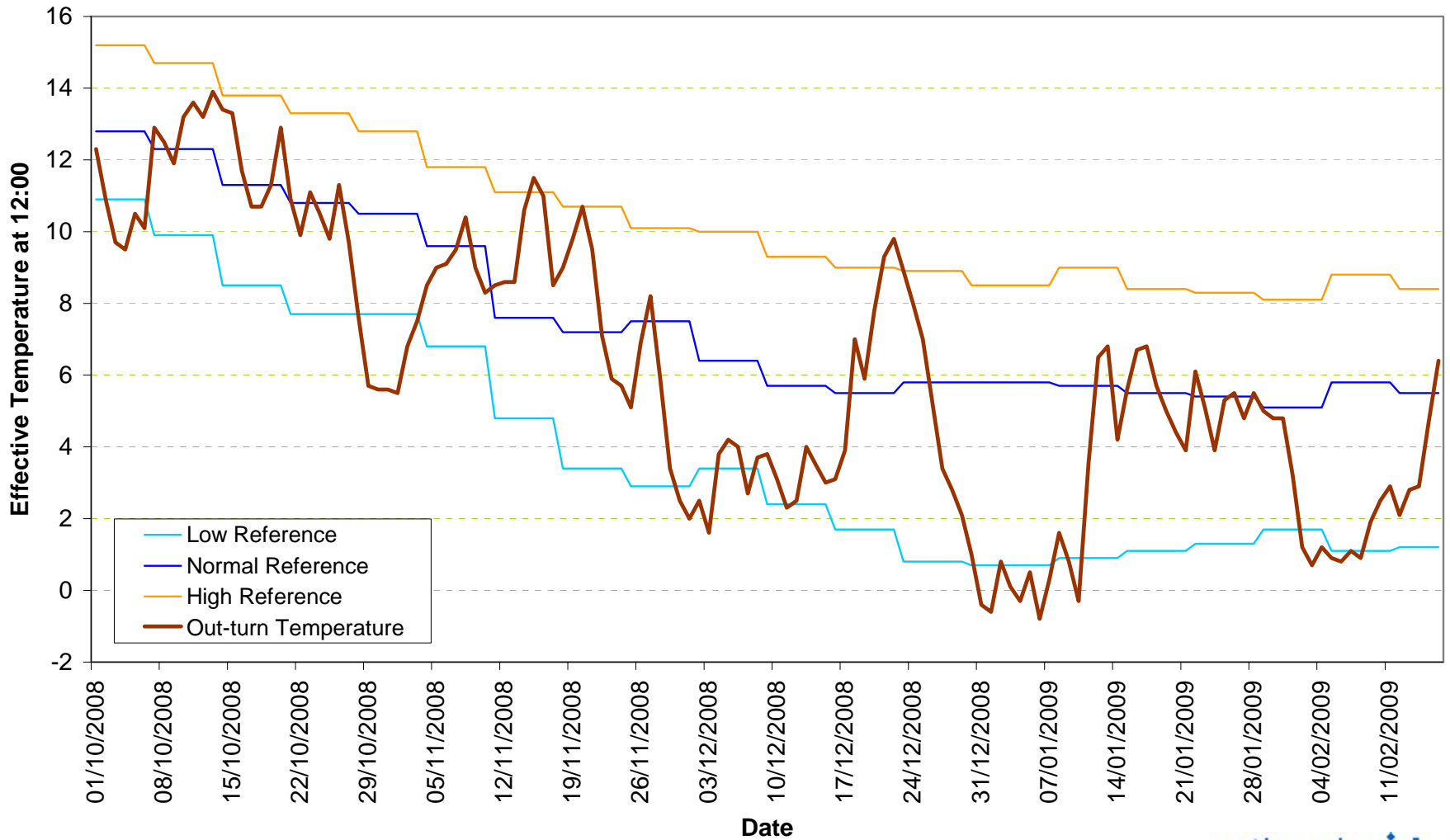


"Call the office. I'm starting my vacation today."

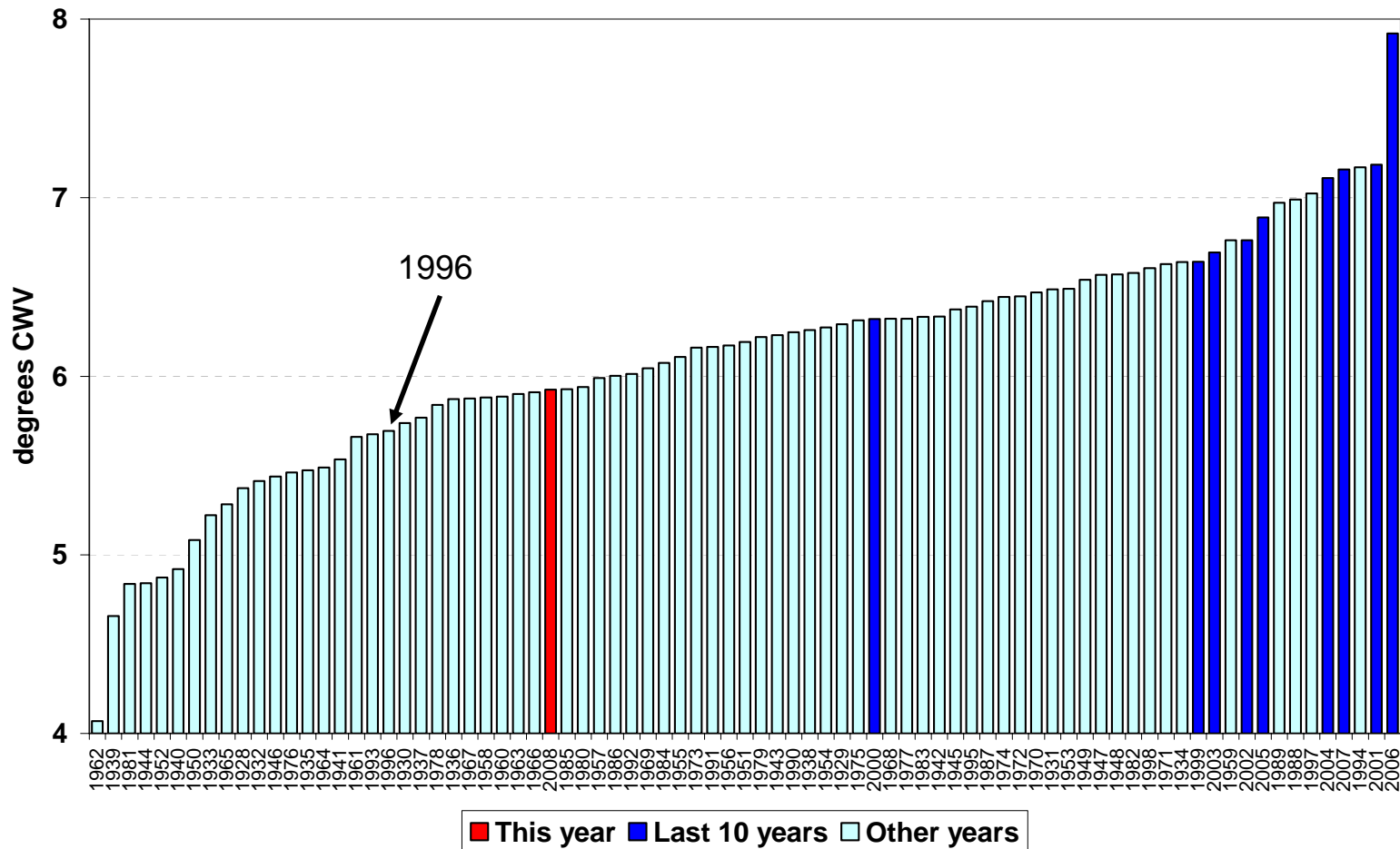
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The power of action.

Temperatures



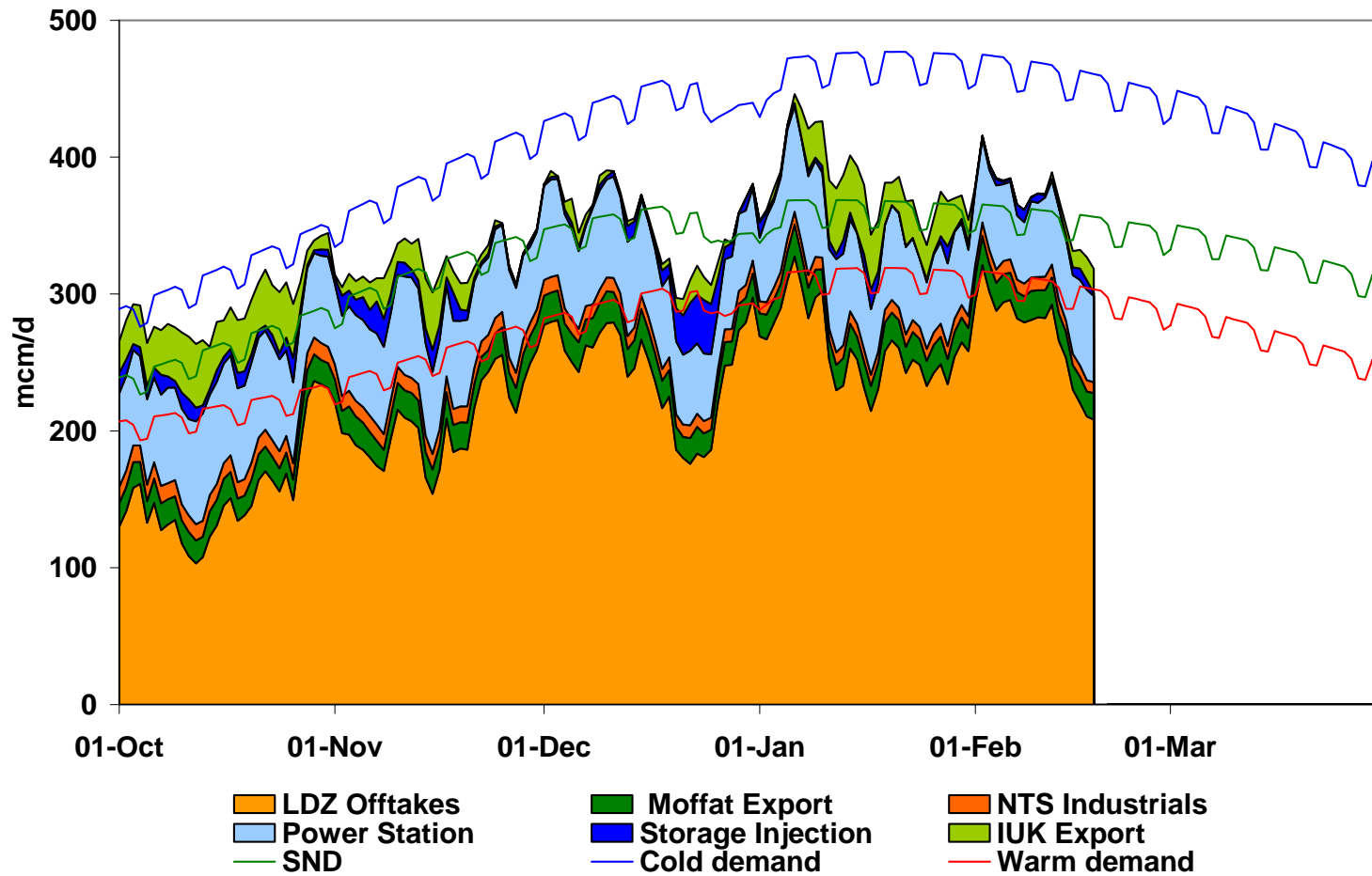
Mean National CWV: October 2008 – Jan 2009



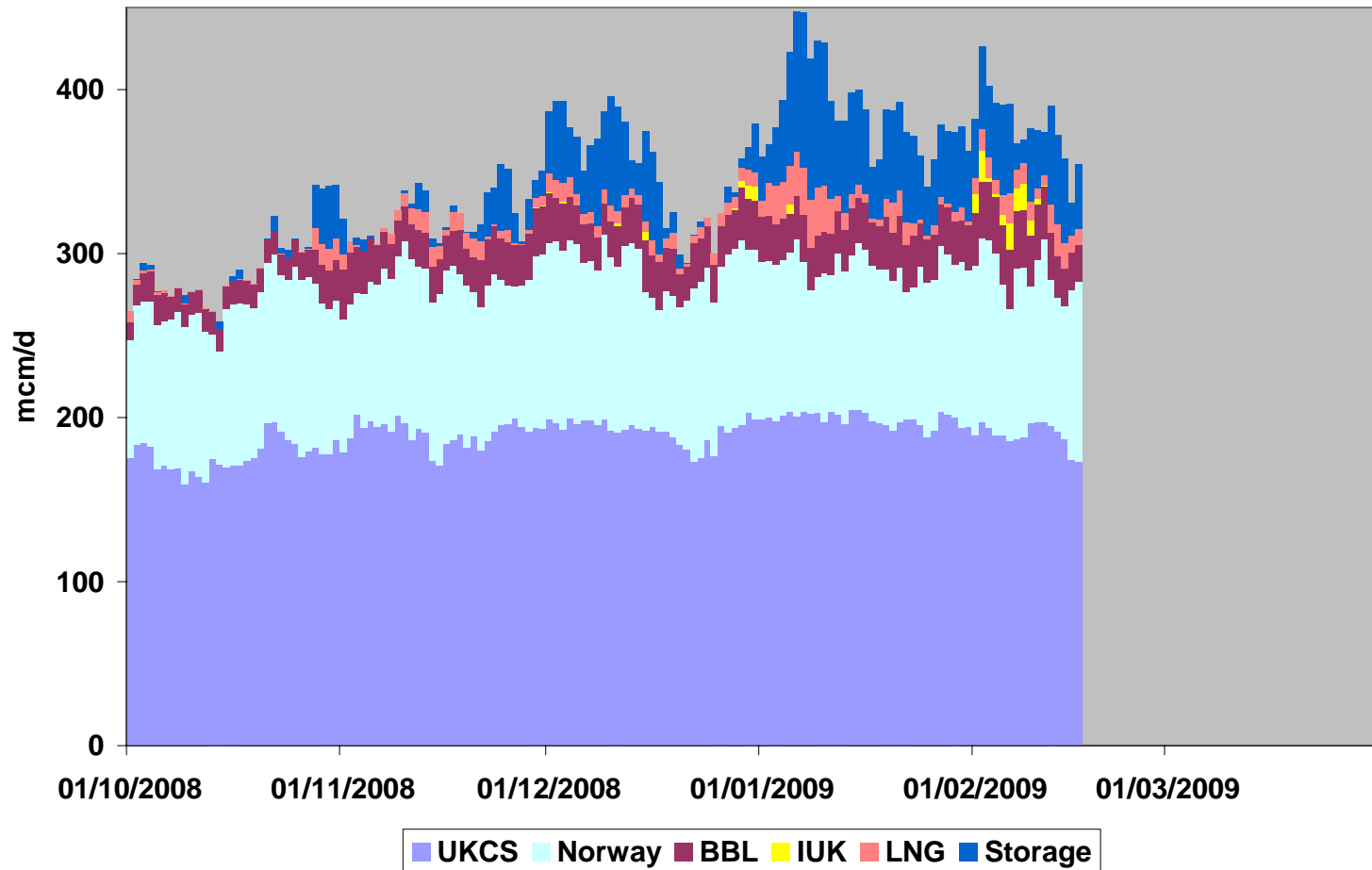
Gas Demand & Supply



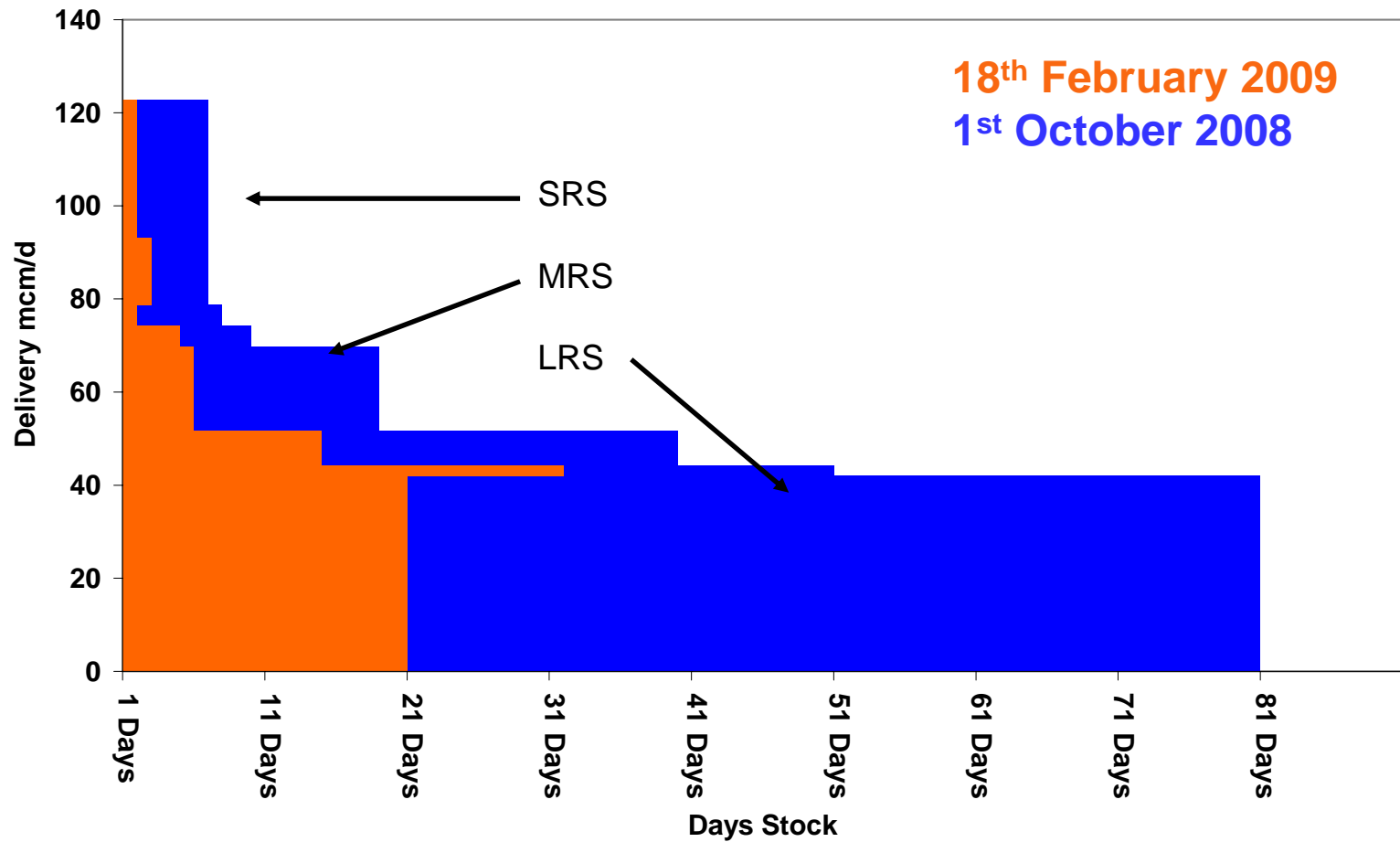
Gas Demand



All Gas Supplies



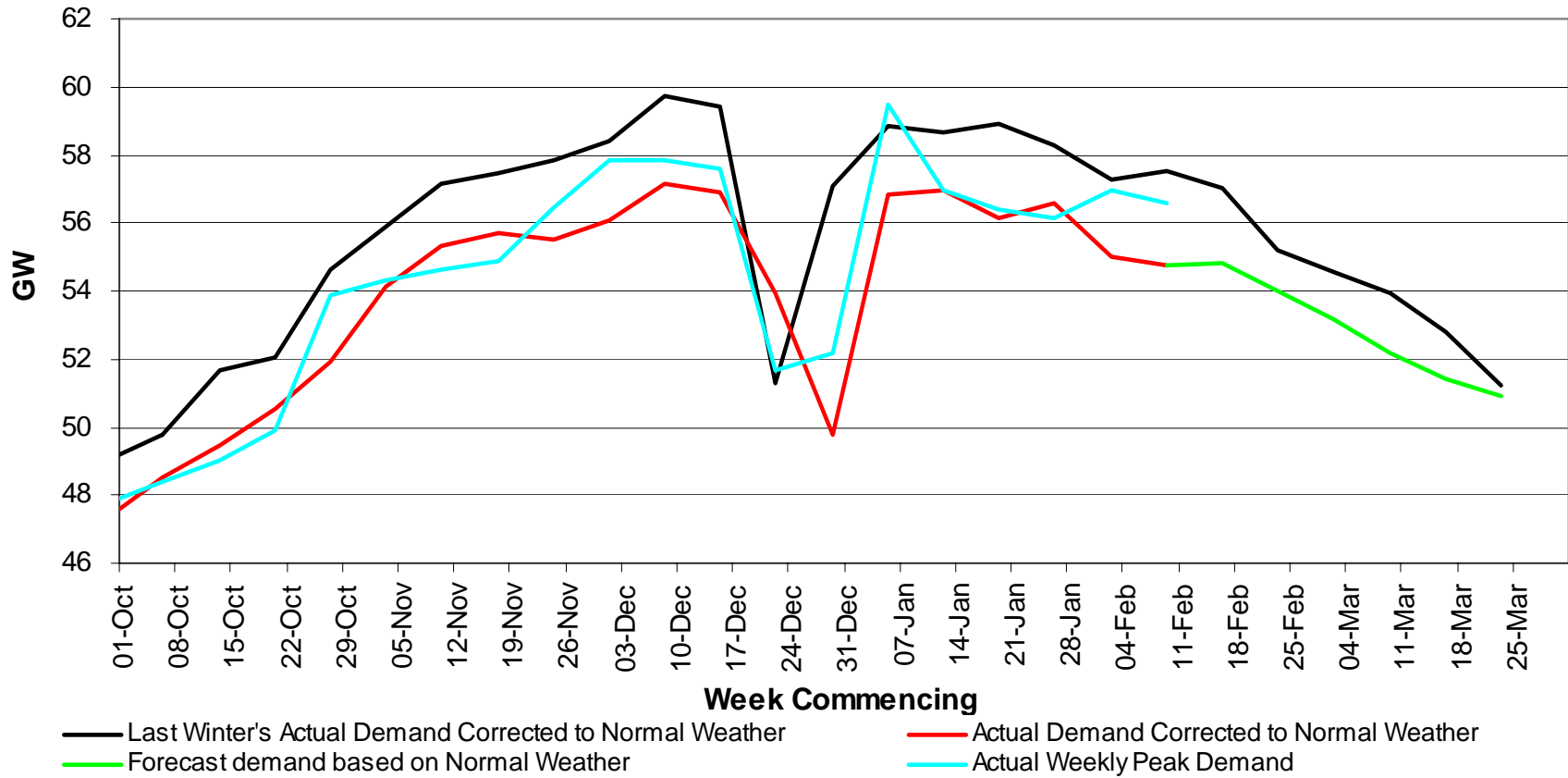
Remaining Storage



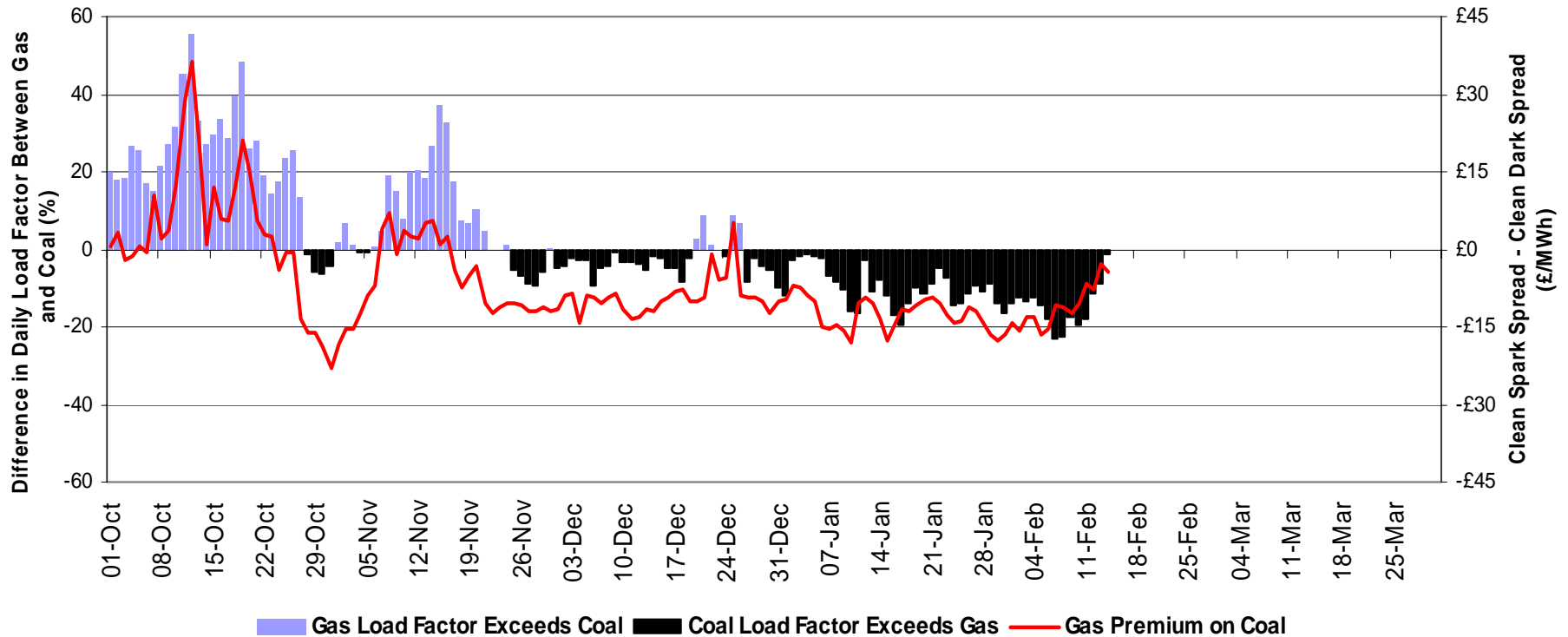
Electricity Demand & Supply



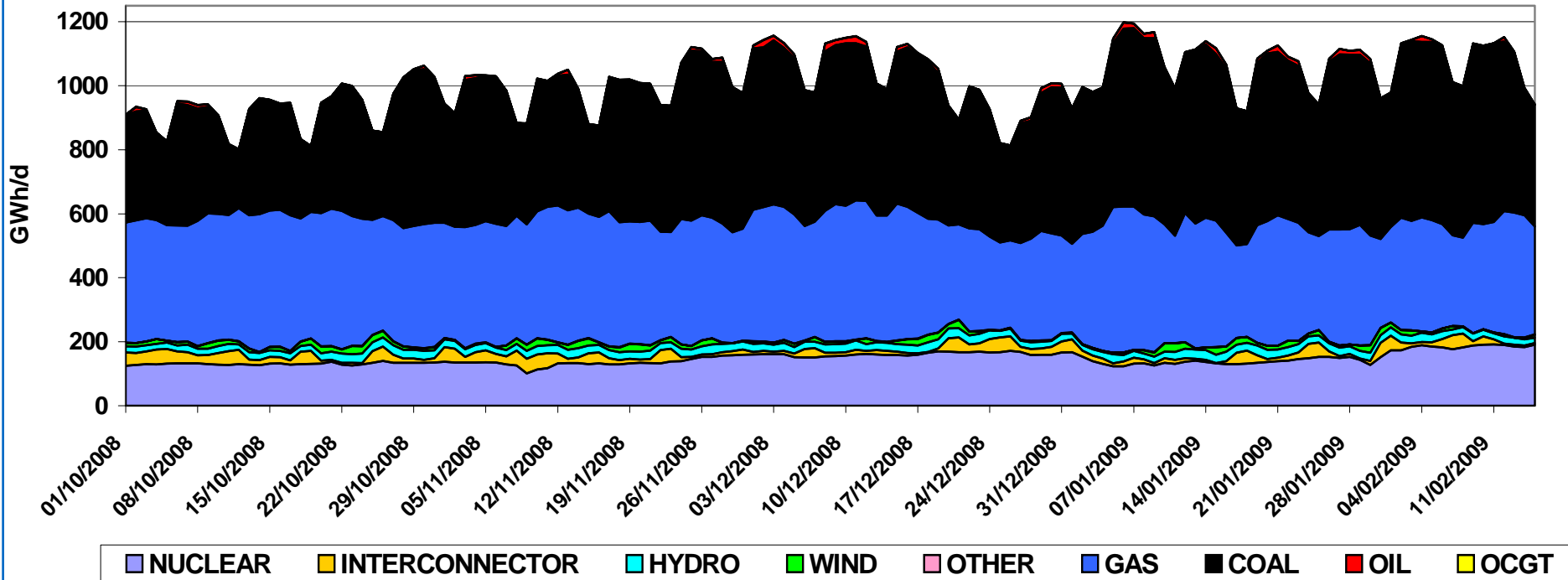
Weekly Electricity Demand vs Normal and Last Winter



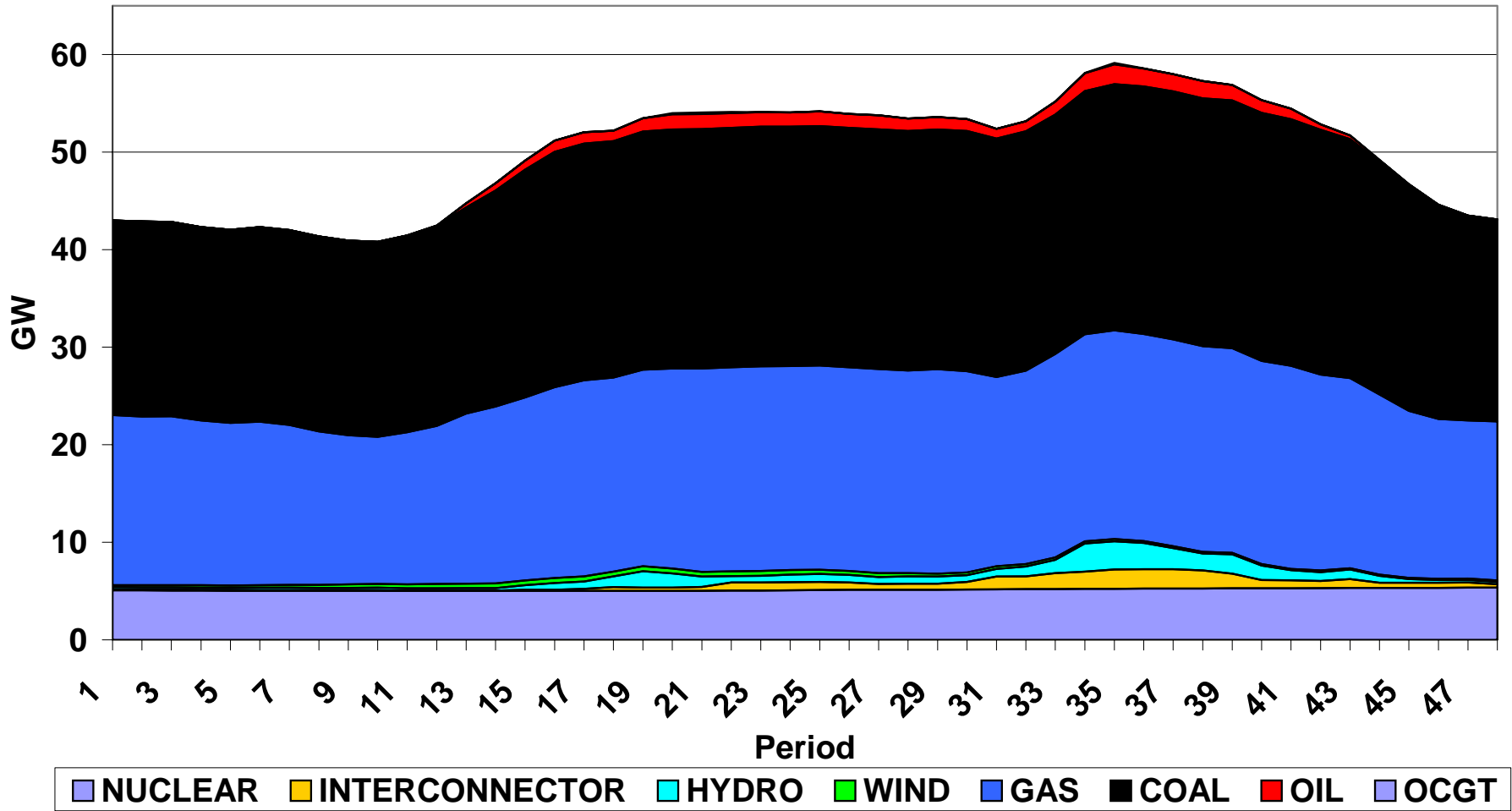
Daily Gas v. Coal Generation



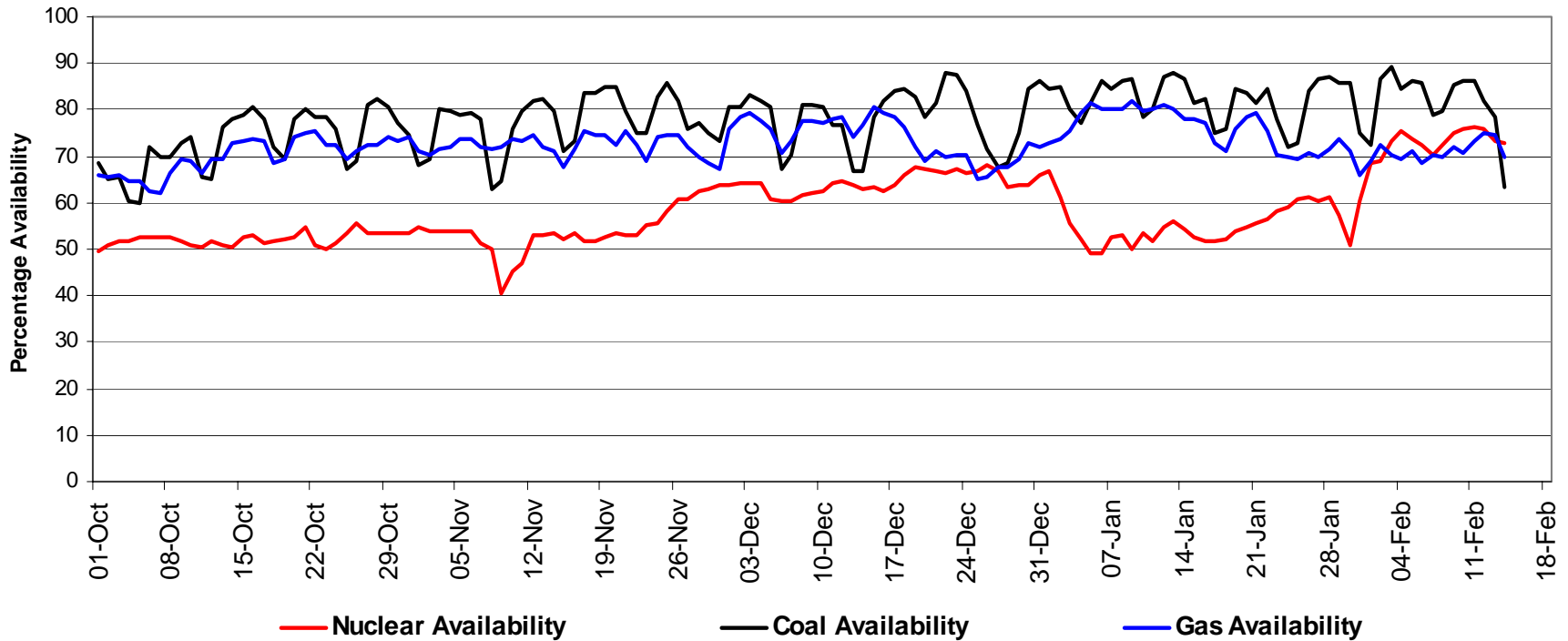
Generation Mix – Winter So Far



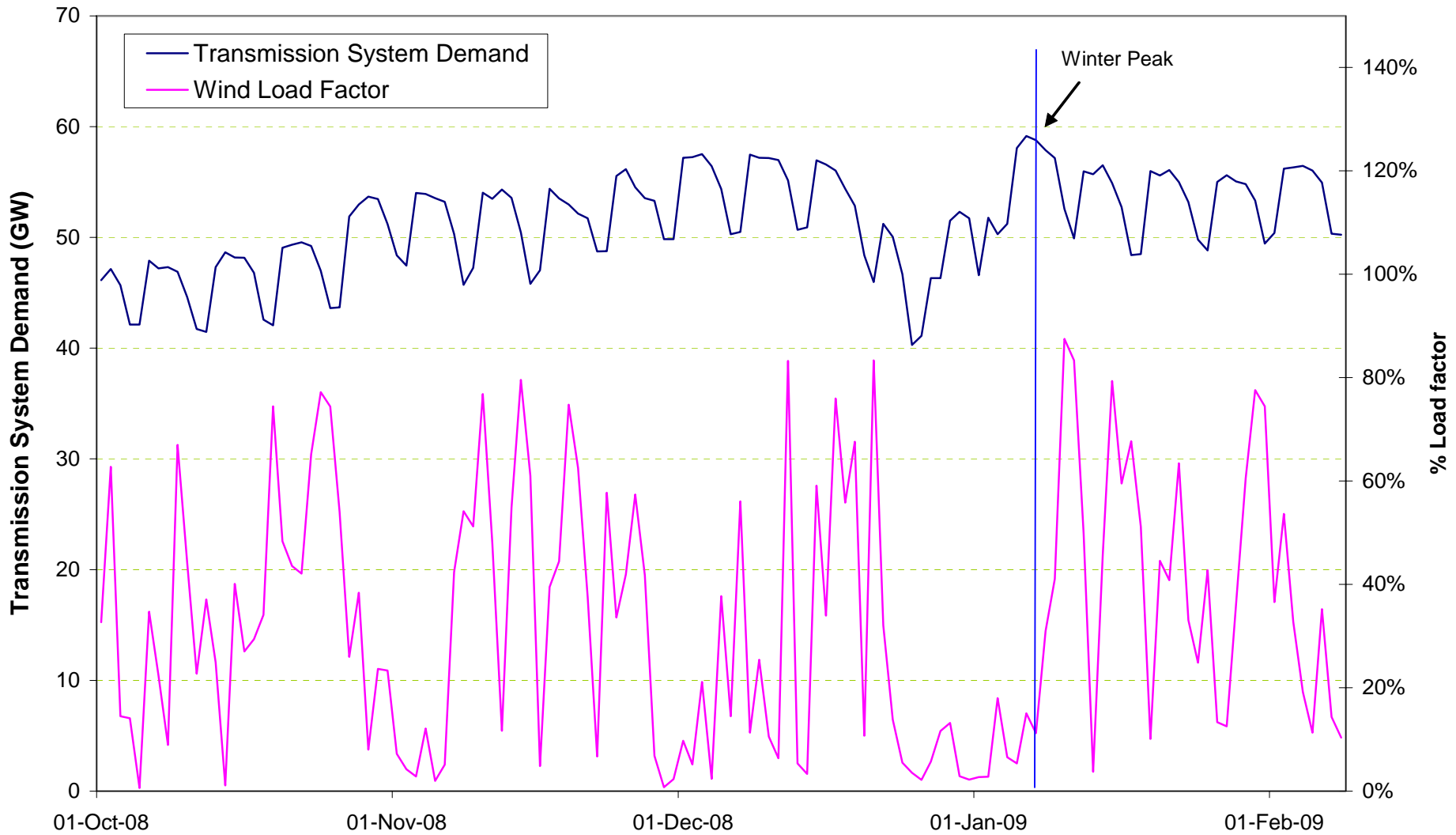
Peak Day Generation Mix



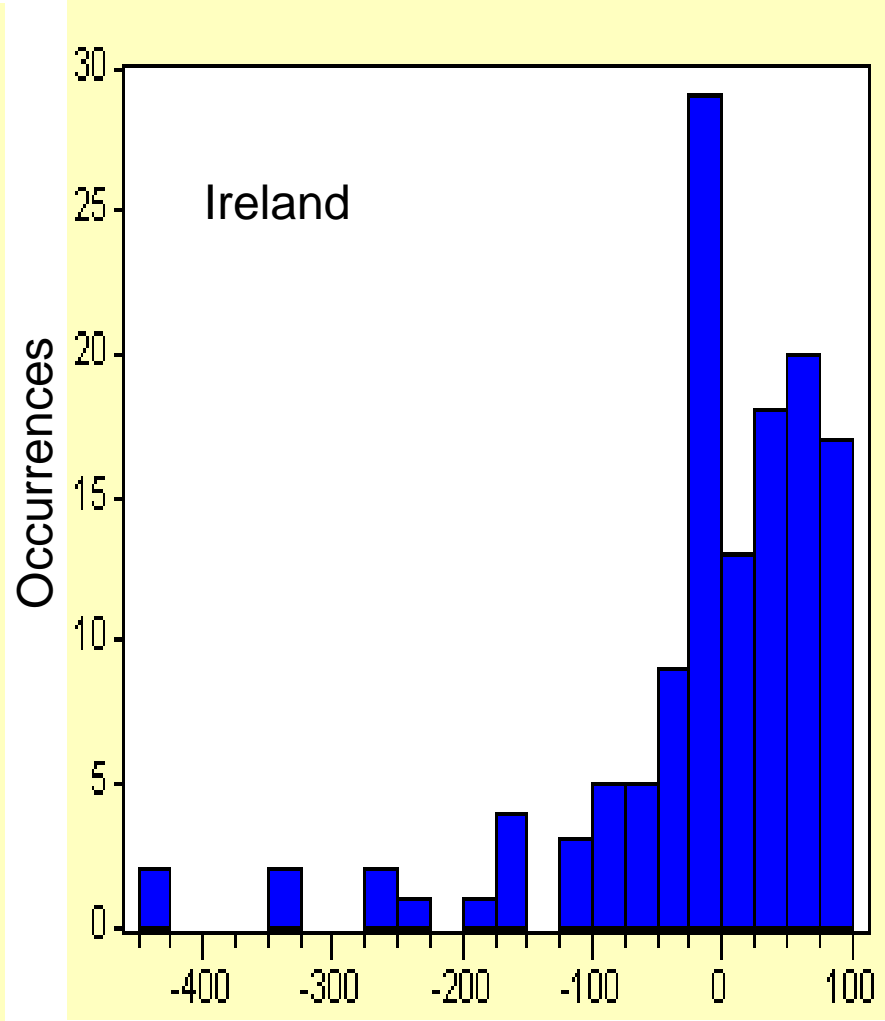
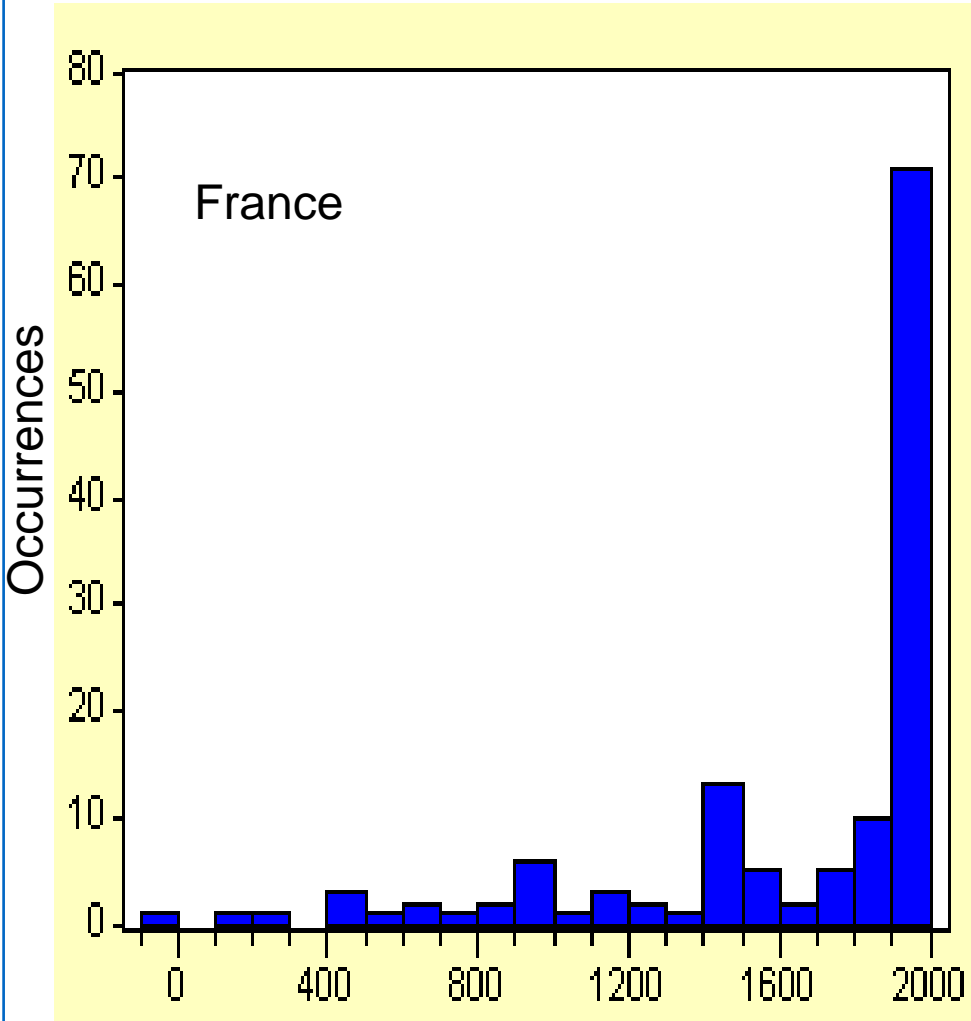
Generation Availability – Winter So Far



Wind Intermittency – Wind Output at Daily TSD Peak

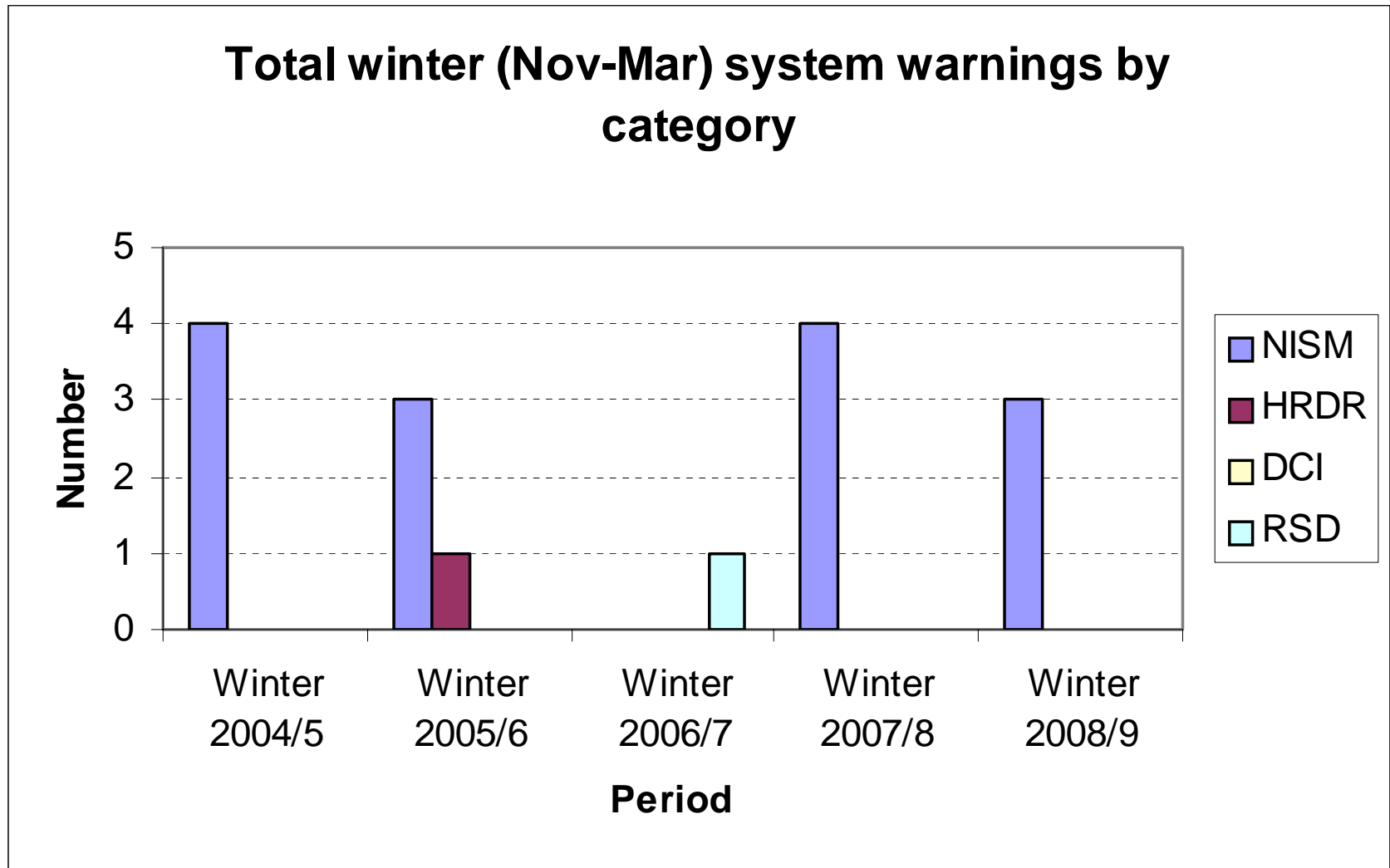


Export/Import to France and Ireland at Daily Peaks



“+” = Import “-” = Export

System Warnings So Far



Summary

◆ Coldest winter to since 1996

- ◆ Cold based on recent winters but only moderately cold for long term data set

◆ Gas Demands

- ◆ NTS industrials & DN demand ~ 20 mcm/d lower
- ◆ Offset by higher power generation and IUK exports

◆ Gas Supplies

- ◆ UKCS, Norway & BBL performed well, all at or above forecast
- ◆ Grain II commissioned late December providing an import source of supply
- ◆ No Milford Haven (yet) or Aldbrough storage
- ◆ Significant use of all types of storage

Summary

◆ Electricity Demands

- ◆ Significantly reduced by the current economic slowdown
- ◆ We estimate around 2GW impact on the winter peak

◆ Generation

- ◆ Nuclear availability has been low with technical issues delaying unit returns
- ◆ Upside with an Oldbury unit extension

◆ No major security of supply issues

- ◆ Transmission network has performed well
- ◆ Generation availability has been high for gas and coal and improved for nuclear as winter progressed

◆ The winter is not over yet!