Review of Winter 2004/05
Demand & Plant Availability

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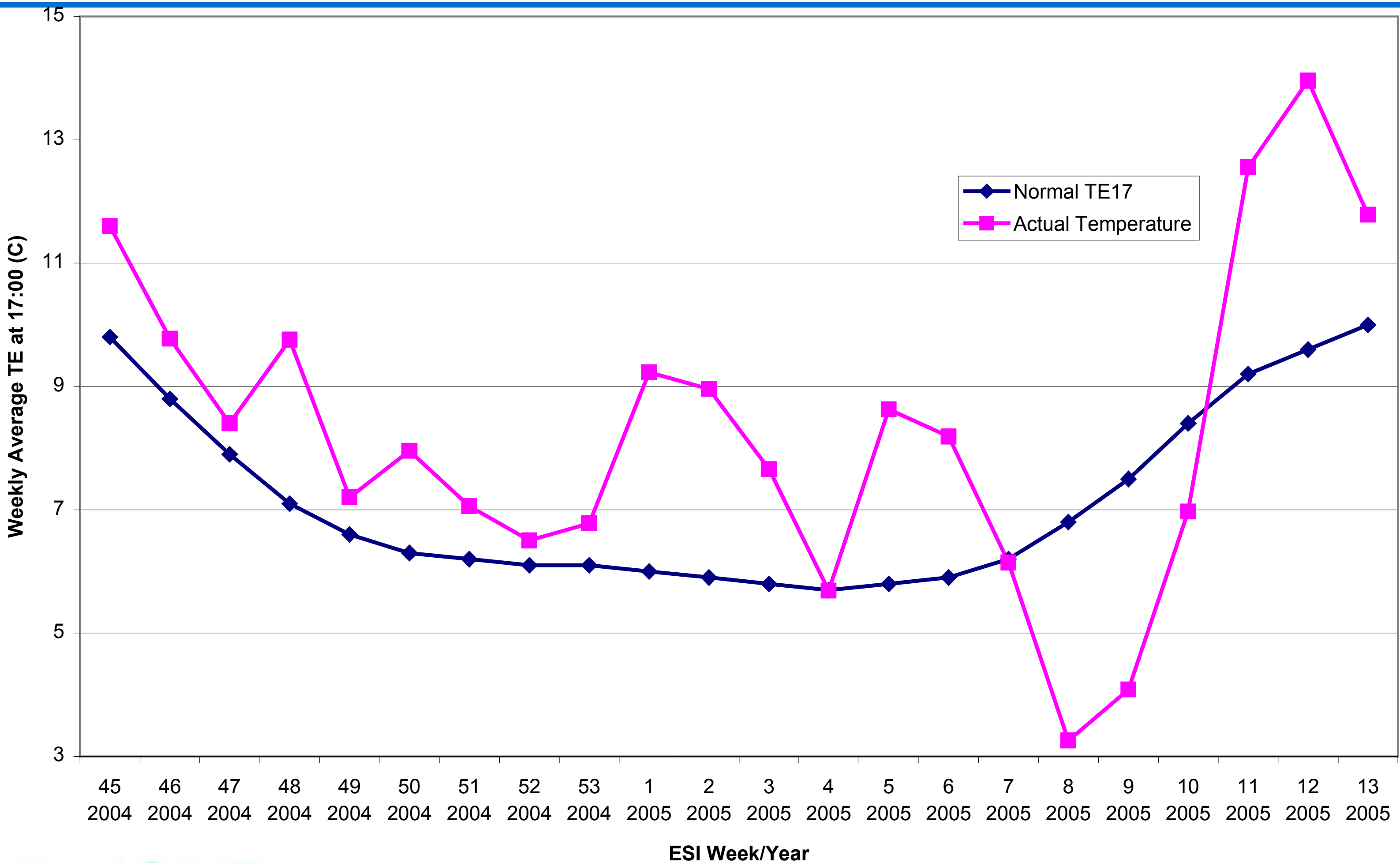
Agenda

- Demand
  - Temperature
  - Peak Demand
  - Triads
  - Customer Demand Management
- Plant Availability
- GB Demand
- Coming Up

Weather

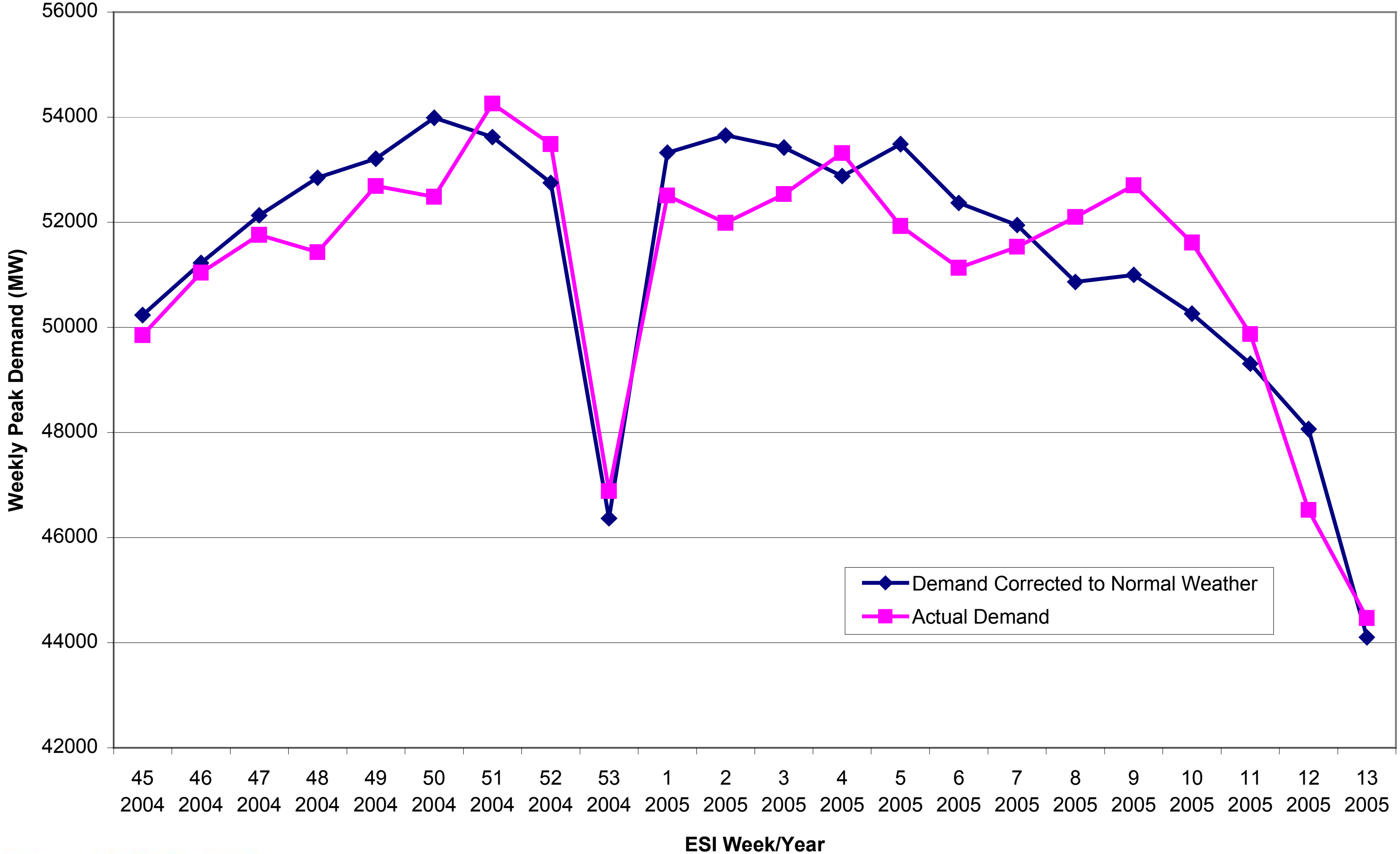
- **1 in 15 Warm**
- **November 2004**
  - A very dry month. A dull month, particularly over western areas. Mean temperatures were around 1-2 °C above average.
- **December 2004**
  - A dry month across most southern and eastern areas of the UK. Mean temperatures were above average. Sunshine levels generally above average.
- **January 2005**
  - Mean temperatures were the warmest since 1990 for England, Wales and the UK. Most of England and Wales had well below average rainfall. Well above average sunshine over the south-east of the UK.
- **February 2005**
  - Mild at first, then turning cold in the second half. Rainfall totals were below average away from eastern areas. Some areas in the south had only a quarter of their normal rainfall and many areas had their fourth consecutive month with lower than average rainfall totals.
- **March 2005**
  - A cold and wintry start with some significant snowfall and sharp overnight frosts. Turning milder with some heavy rain during the second half of the month. Notably warm temperatures during the third week. Mist and fog, both inland and along some coasts, became a feature later in the month.

Effective Temperature at 5 pm - weekly average (England and Wales)



National Grid Transco

Weekly Peak Demand



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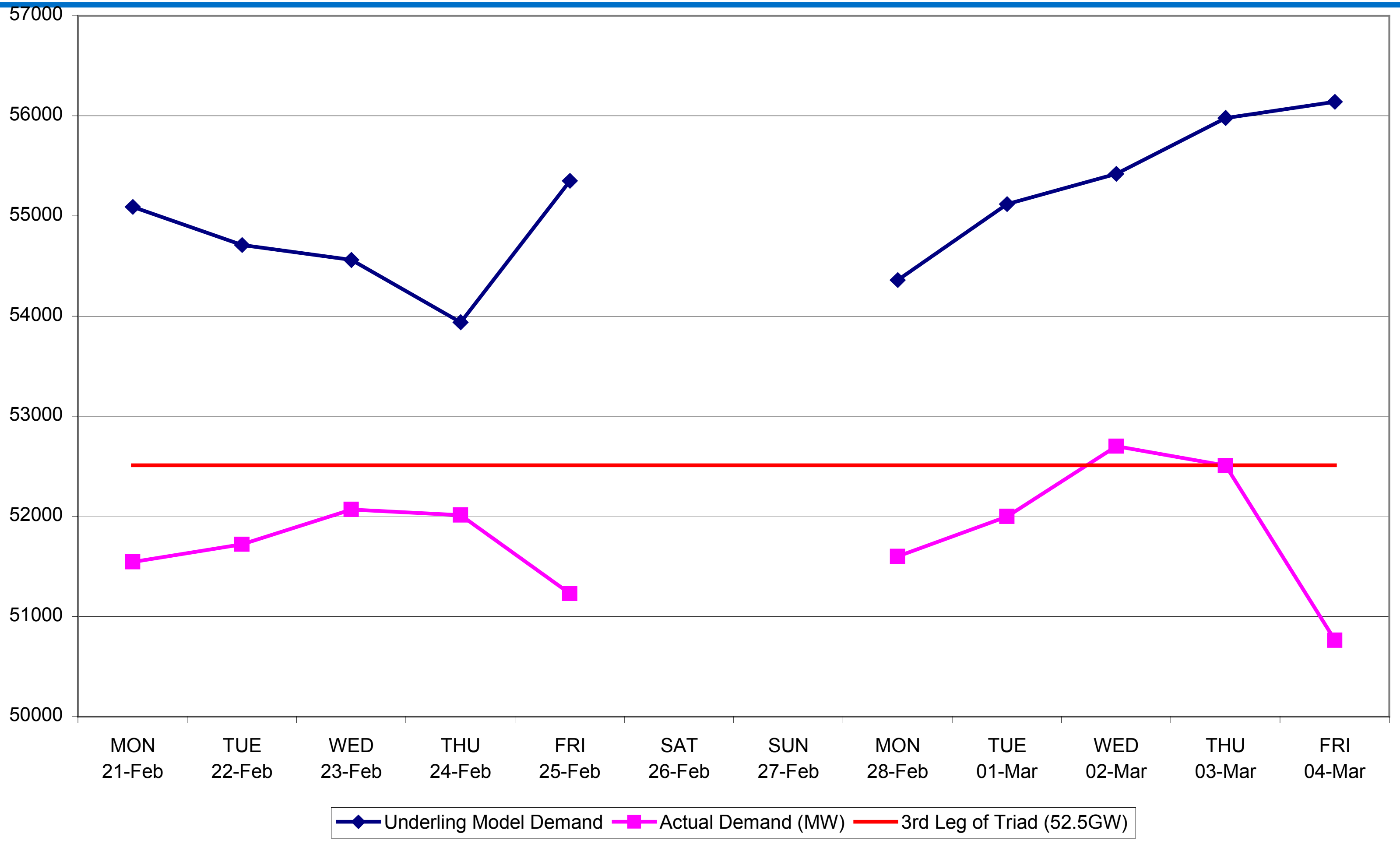
Triads (Provisional)

- 1 December 2004
  - 52.5 GW effective temperature at 5 pm 6.5C
- 13 December 2004 (Peak of the winter)
  - 53.8 GW + 0.2 GW of non-BM Standing Reserve temp 5.1C
- 24 January 2005
  - 53.1 GW temp 4.6C
- Actual peak demand corrected for ACS conditions
  - 55.4 GW temp ~2 C

Triad TNUoS charging

- Consumers have Half-Hourly (HH) meters **or** Non-Half Hourly (NHH) meters
- HH metered demand (large industrial customers) is charged on average demand at Triad (17GW)
- Triad charging period is between November and February
- NHH metered demand (small commercial and domestic customers) is charged on daily consumption 4pm - 7pm

Triad avoidance at the end of February 2005



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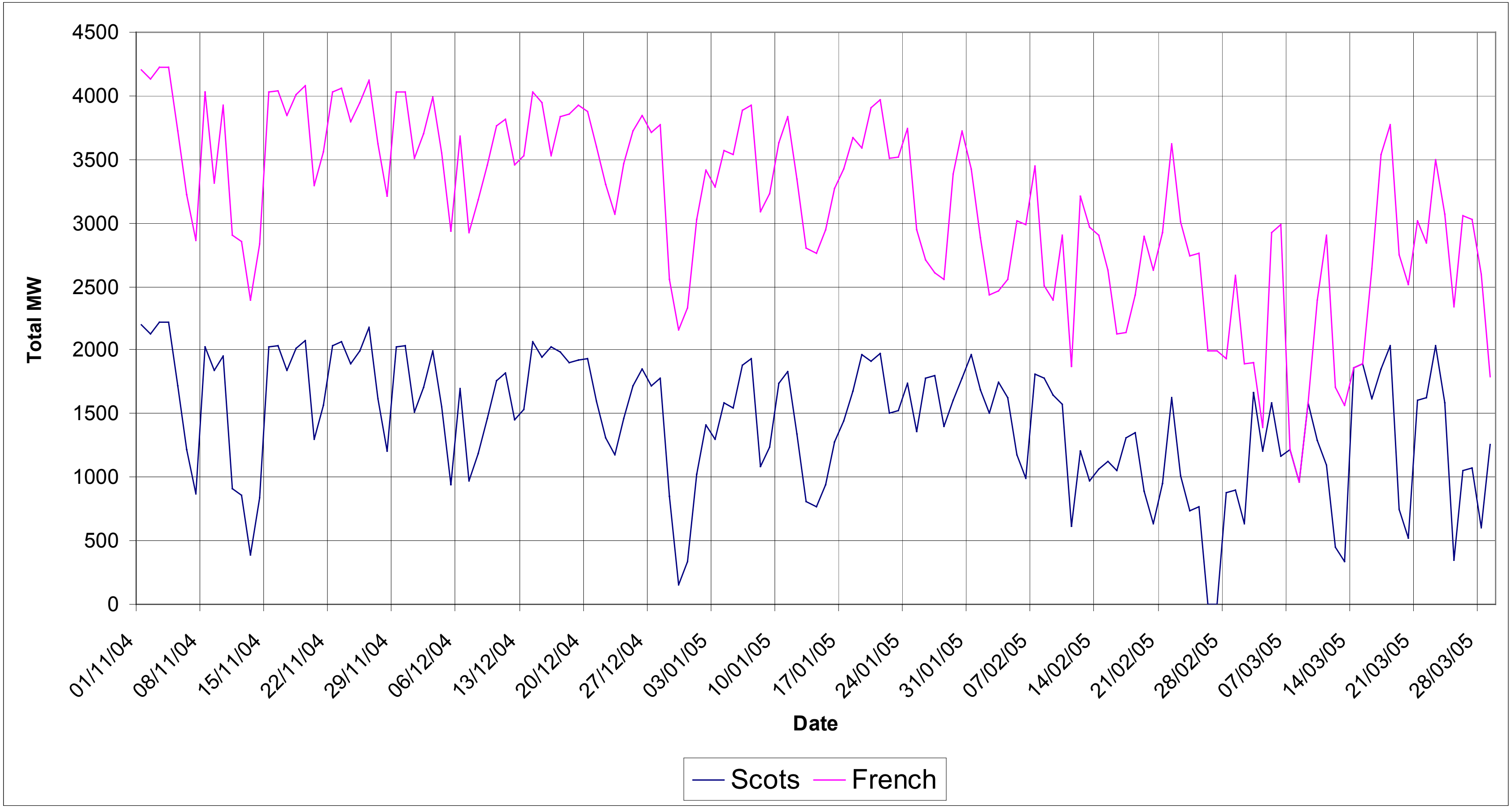
Generation Availability (England and Wales)

- Across the winter, Operationally Reviewed Capacity was 66.4 GW, of which around 2.4 GW of plant was on sustained post-fault outage
- 0.8 GW of plant returned from mothballs for winter peaks
- Over 3 GW of imports from France and Scotland over darkness peak
- The plant on outage during the first half of the winter returned by early January
- Low volumes of notified outages for January-March 2005

Interconnector Flows (bds only?)



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GB Demand

- GB demand is around ~10% higher than E&W. Elexon and Ofgem have consulted with industry as to treatment of non-BMU generation within Scotland
- There is currently roughly 730 MW of large licence-exempt generators between 5 (30) MW and 100 MW in Scotland. 450 MW is under construction and is expected by end 2005. These are may become BMUs
- None of the current EELPS has currently chosen to be a BMU, though the situation is not finalised
- ~210 MW of this 730 MW currently has live metering and is included in BMRS “Demand” and Availability figures. This total is increasing, and it likely that around 80% of EELPS will have live metering, and will be included in NGC’s demand figures

GB Margins

- NGC is currently working with generators to make OC2 availability figures more representative of BM availability.
- There is currently around 700 MW of OC2 availability which does not appear in BM timescales, due to the complex modular configuration of some generators.
- OPMR modifications are being made where constraints are affecting the available generation
- NGC is looking at making more information available to the industry

TOGA

- Went live on 1 April with considerably reduced functionality - only the bare bones working
- Operating in “contingency mode” with multiple manual workarounds and very slow system response/processing times
- Most independent generators now using TOGA
- A few generators still using EDT
- Feedback from customers has been mixed, smaller/independent generators more positive than larger portfolio players
- Great amount of work still required to obtain “fit for purpose” system, and is being progressed
- Progress updates will be provided via normal channels

Forthcoming Reviews and Publications

Coming Up:

- NGC GB Demand Definition – April 2005
- OC1/OC2 Review - ongoing
- Preliminary Winter Outlook Report - May 2005
- GB 7 Year Statement - May 2005
- ACS Demand Definition (7YS)

Going out:

- England and Wales

Summary - update

- Mild Winter - 1 in15 Warm, but cold spell in late February/early March
- Cold Spell outside windows for maximum demand (lighting load)
- Evidence of significant triad avoidance
- Average demand growth continues to around 1-1.5%
- Little growth over peak demands
  - Provisional view this is due in part to:
    - Increased un-notified customer demand management over Darkness Peak
    - Increased embedded generation over high demand peak half hours
- Successful return of plant from outage
- Return of mothballed plant and interconnector imports secured demand over actual peaks