

The UK Market from the System Operator's Perspective



European Business Congress – Working Committee: Energy

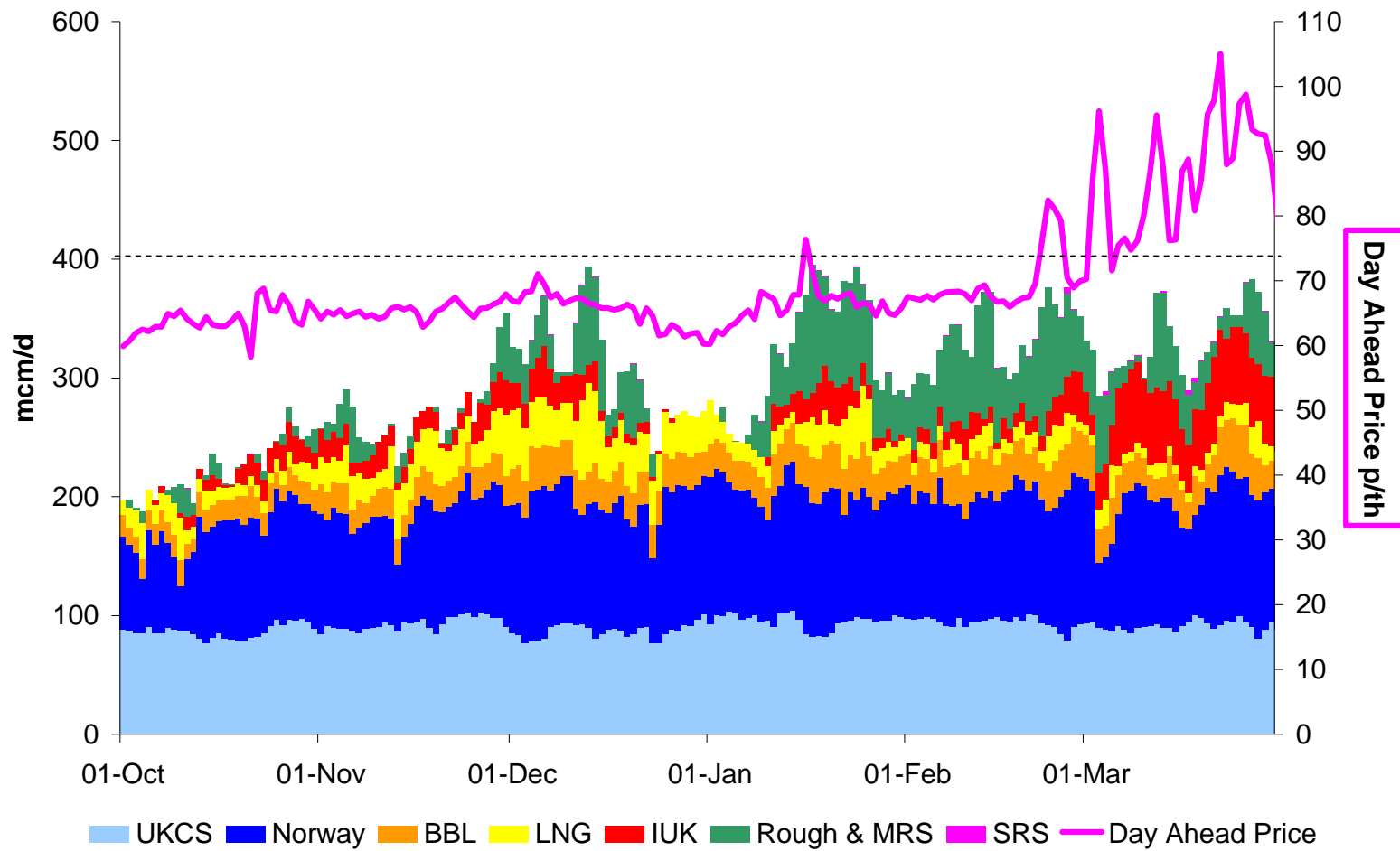
Gary Dolphin

21 March 2014

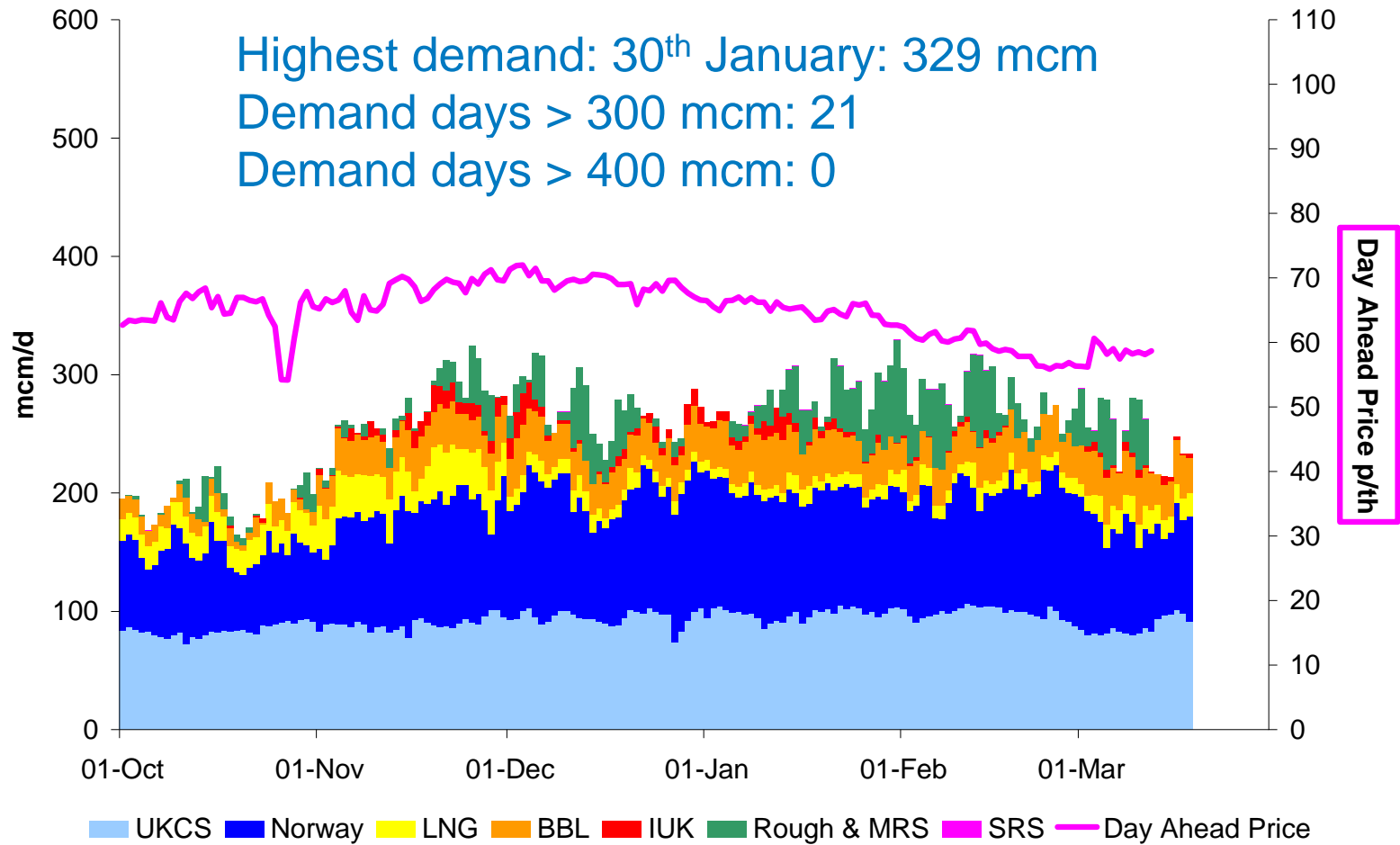
Agenda

- The past...
 - Winter 2012/13
 - Winter 2013/14
- The future...
 - Our 2013 view
 - Our 2014 view

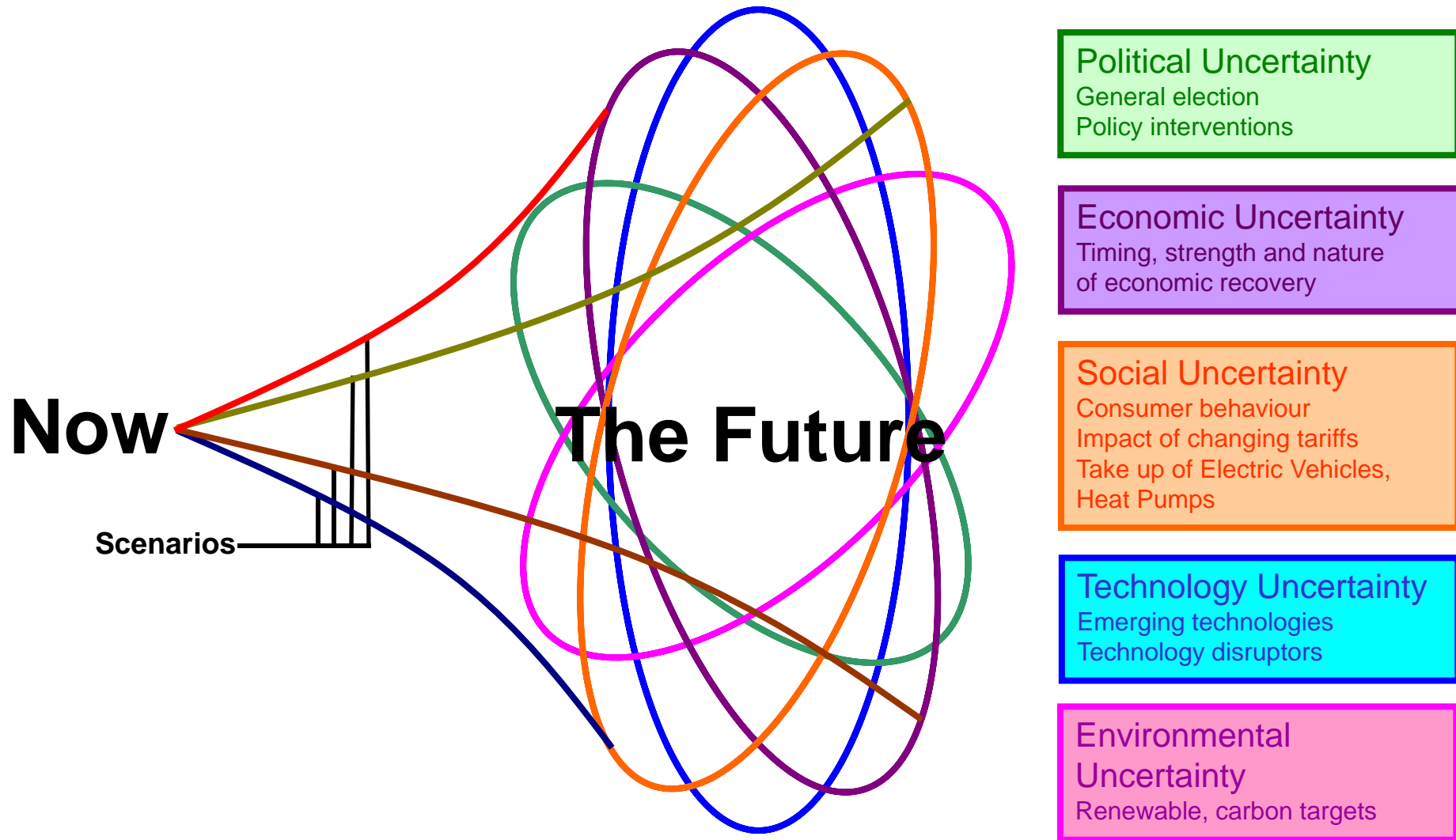
Winter 2012/13



Winter 2013/14

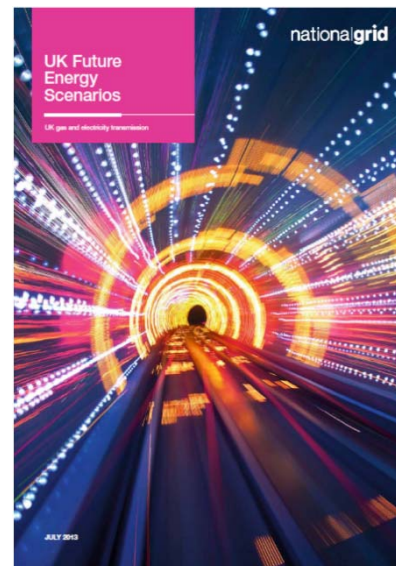


The Future: a scenario-based approach



Future Energy Scenarios 2013

UKFES 2013



Gone Green

Slow Progression

Our 2013 Future Energy Scenarios...

Gone Green

has been designed to meet the UK's environmental targets; 15% of all energy from renewable sources by 2020, greenhouse gas emissions meeting the carbon budgets out to 2027, and an 80% reduction in greenhouse gas emissions by 2050

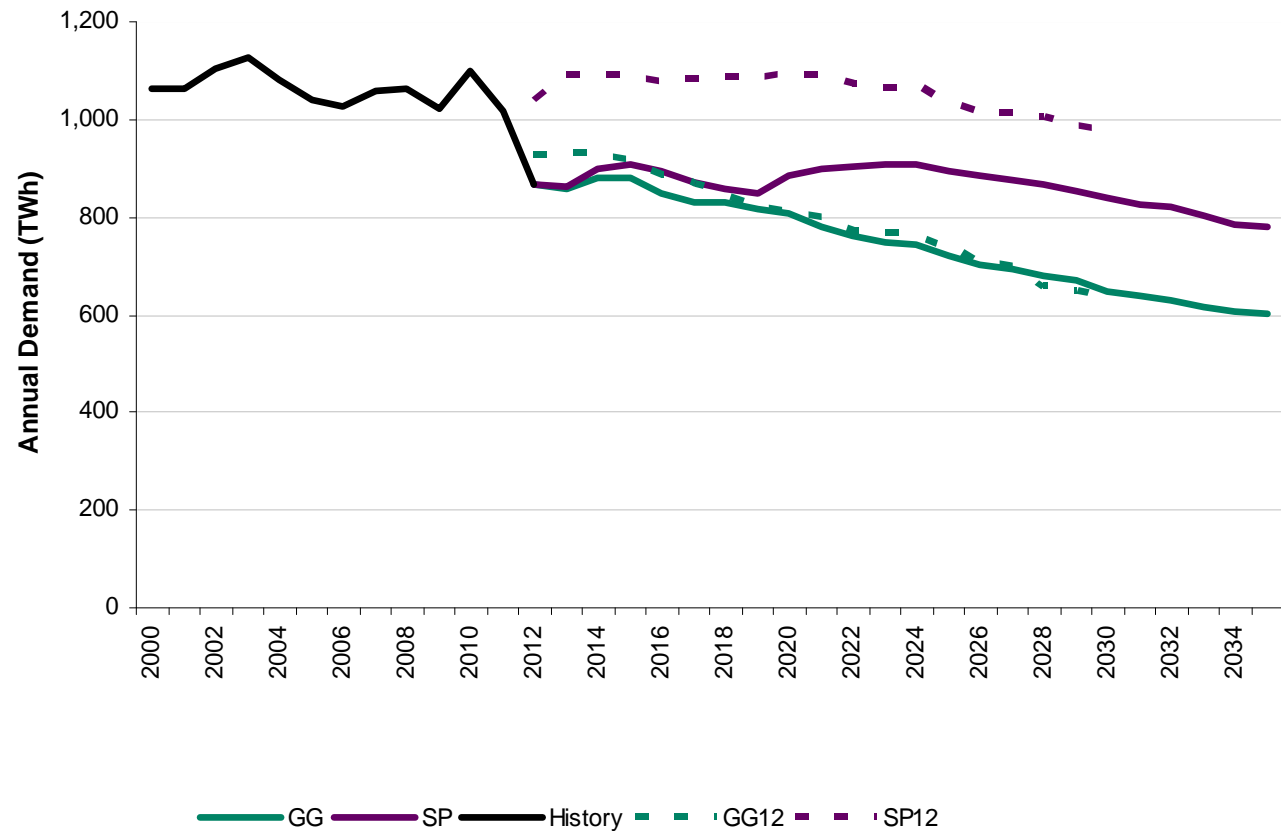
Slow Progression

where developments in renewable and low carbon energy are comparatively slow, and the renewable energy target for 2020 is not met. The carbon reduction target for 2020 is achieved but not the indicative target for 2030

Annual Gas Demand

Energy efficiency and economy reduces demand

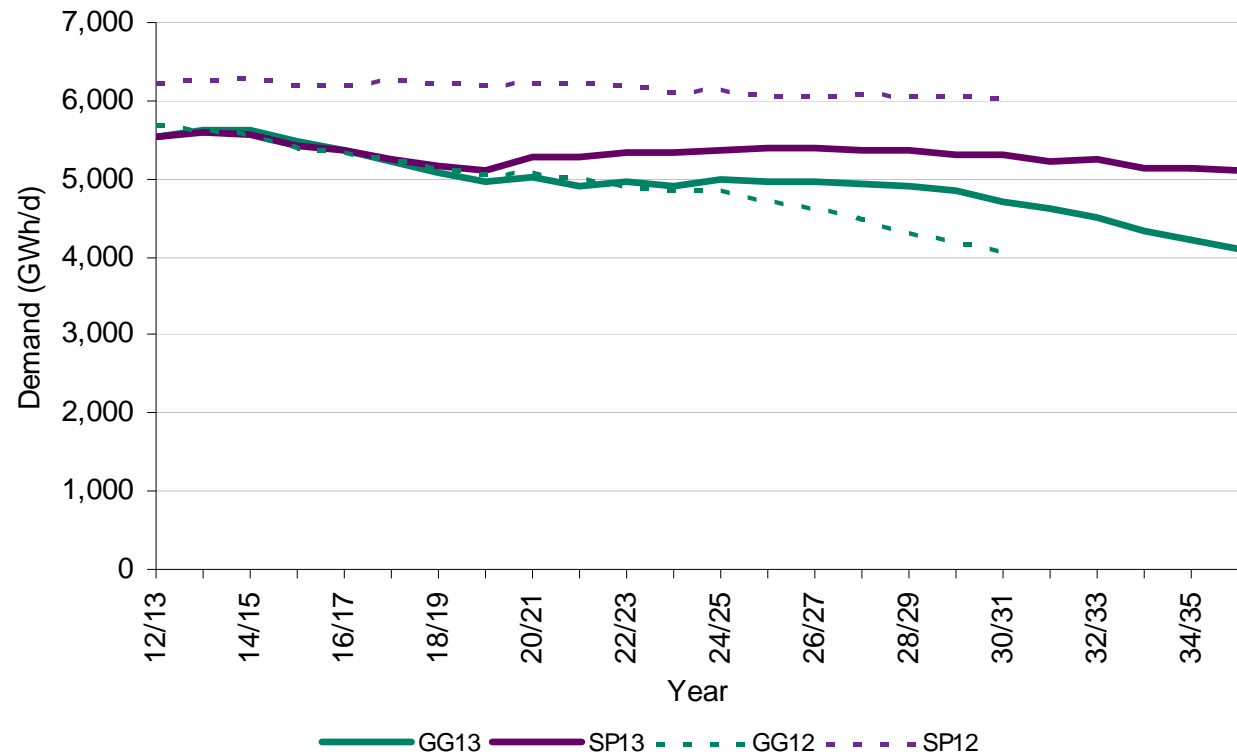
Initially lower than 2012 but Power Generation drives increases in medium term



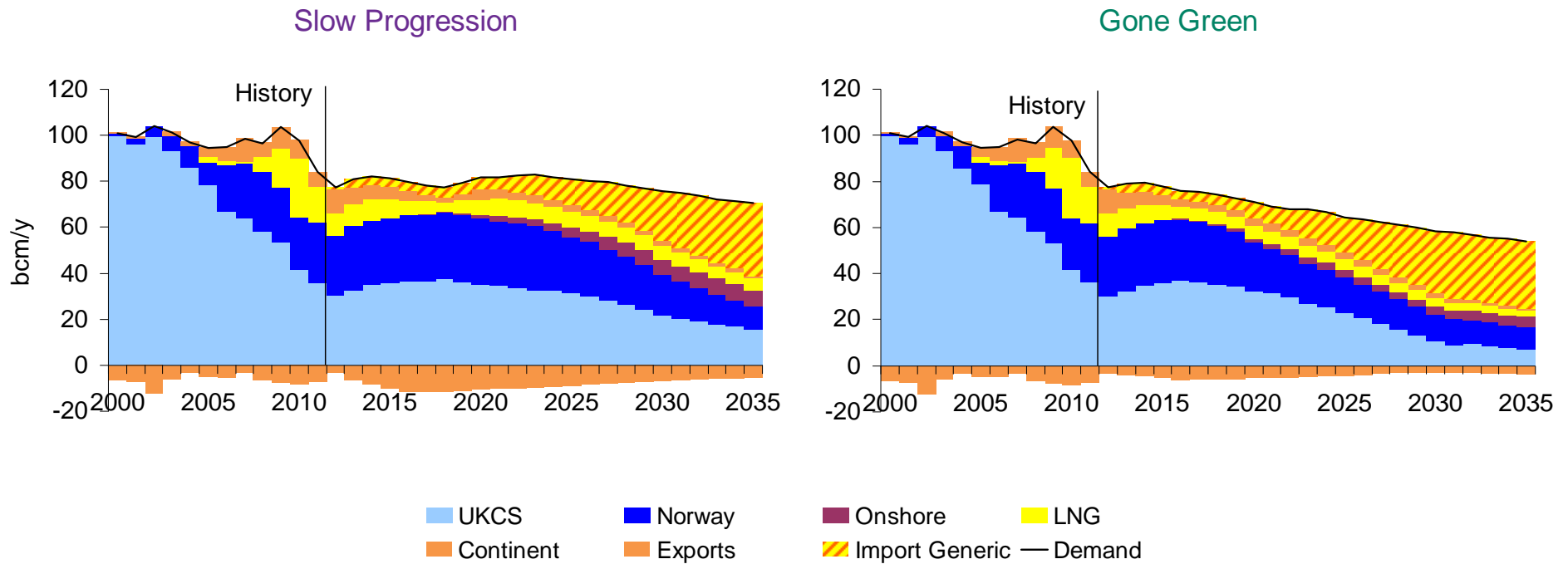
Peak Gas Demand

Domestic peaks start to reduce nearer 2030 due to fuel switching

Power generation peaks maintained beyond 2020

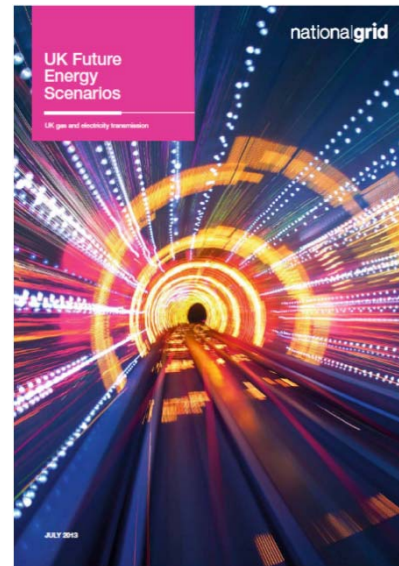


Annual gas supplies



FES 2013

UKFES 2013



Gone Green

Slow Progression

FES 2013 Feedback Doc



“Broader range of outcomes”

“Reflect the trilemma”

“More narrative”

2014 Future Energy Scenarios

