

# Welcome

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#Futureofenergy

## Future Energy Scenarios 2018

### Electricity Supply Andy Dobbie & team

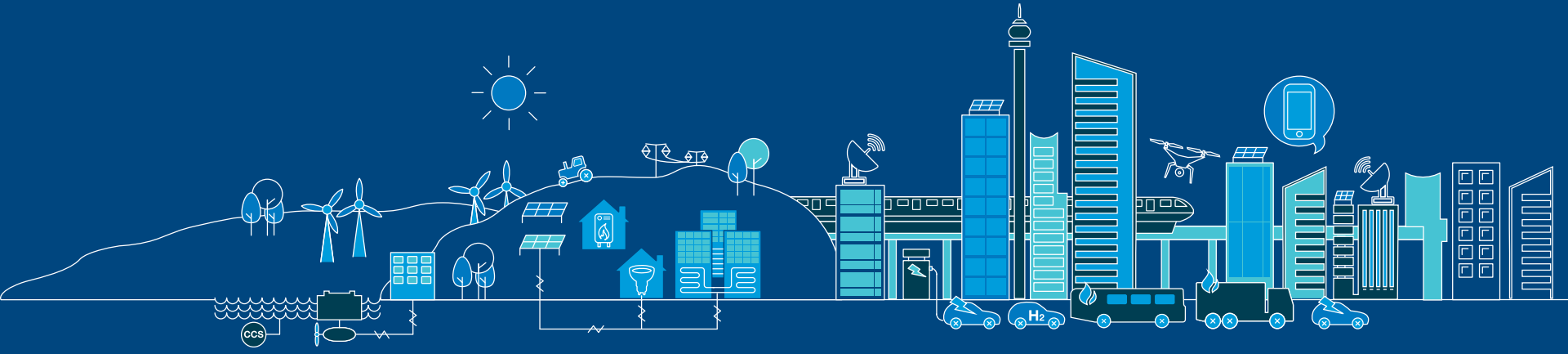


**System Operator**

# FES 2018

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# What we will cover today

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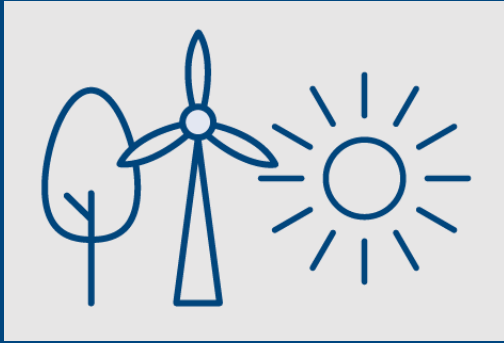
- Future Energy Scenarios (FES) 2018 overview
- Key insights
- Overview of installed capacity
- Capacity projections for some of the different technologies
- Generation output
- Interconnectors and storage
- How to stay involved
- Q&A

# FES 2017 to FES 2018

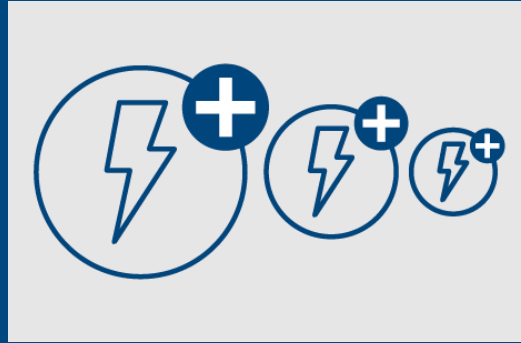


# Key insights

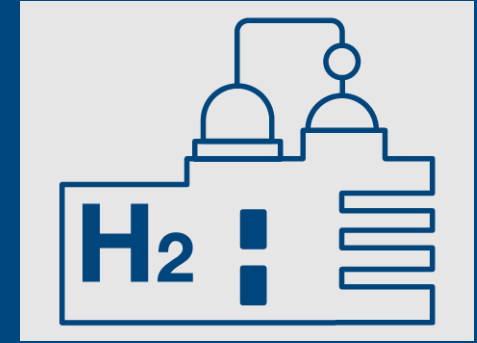
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Low carbon technologies  
will grow at pace

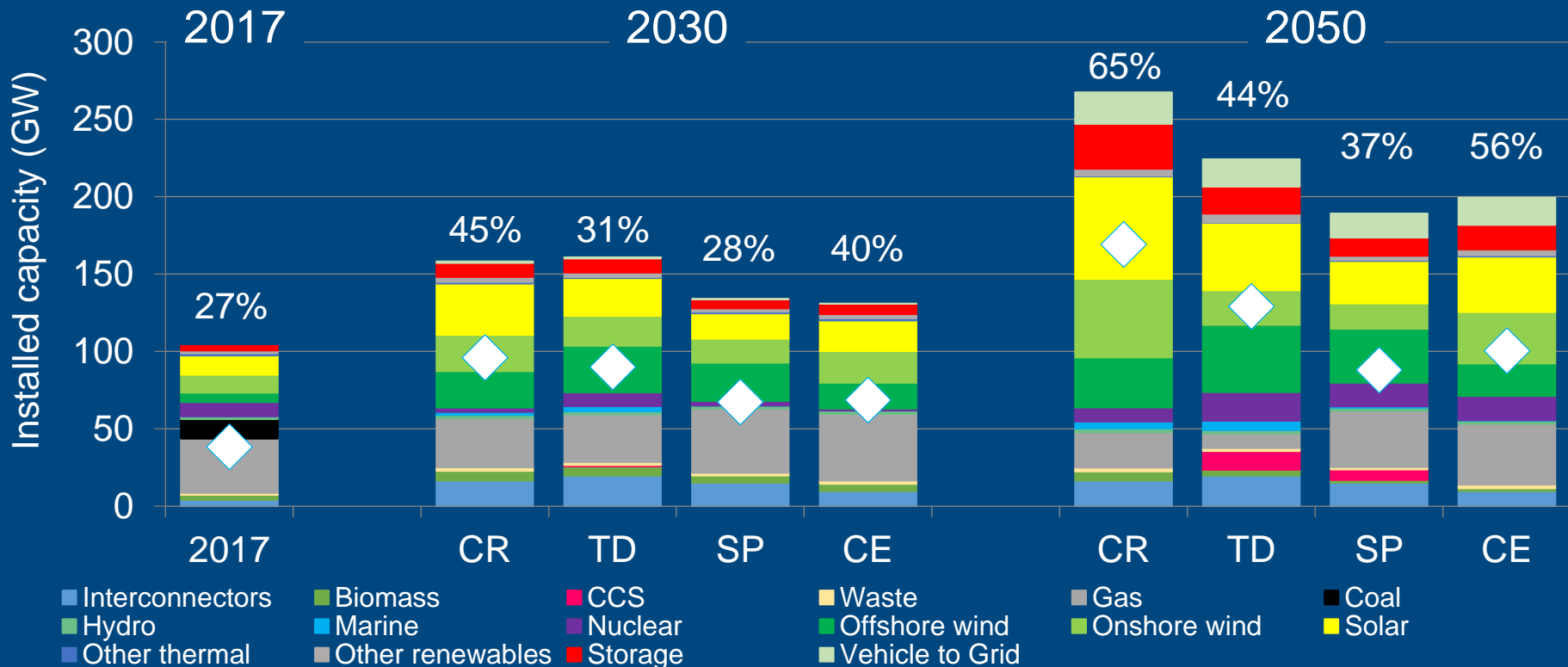


Markets will need to adapt

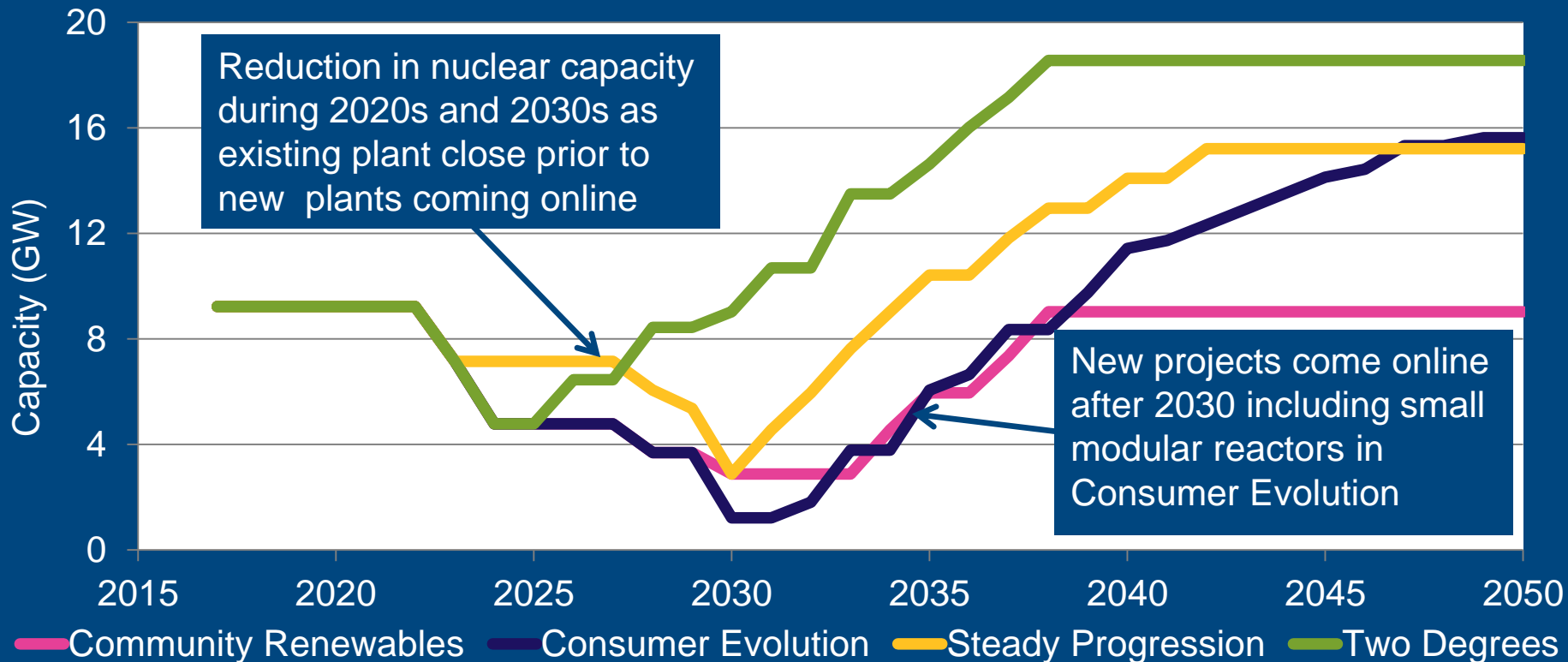


New business models

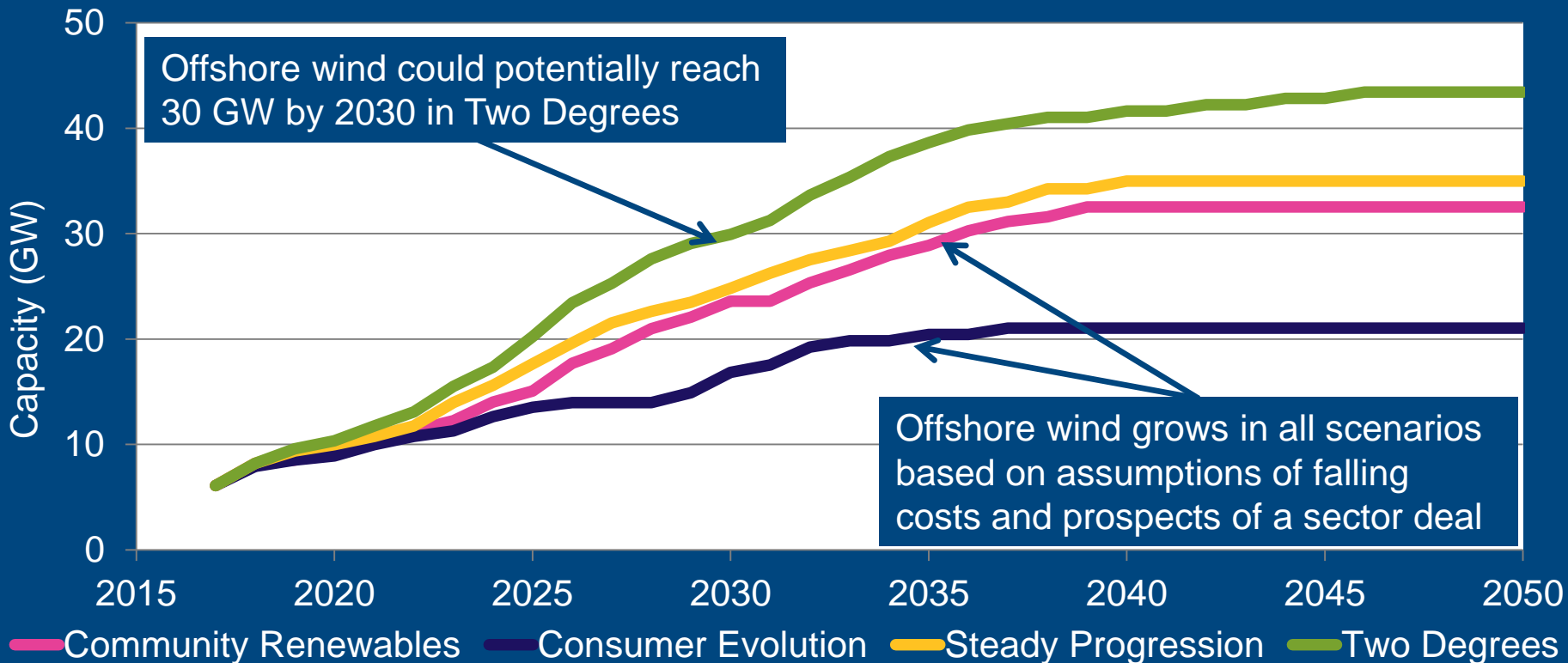
# Installed generation capacity



# Nuclear

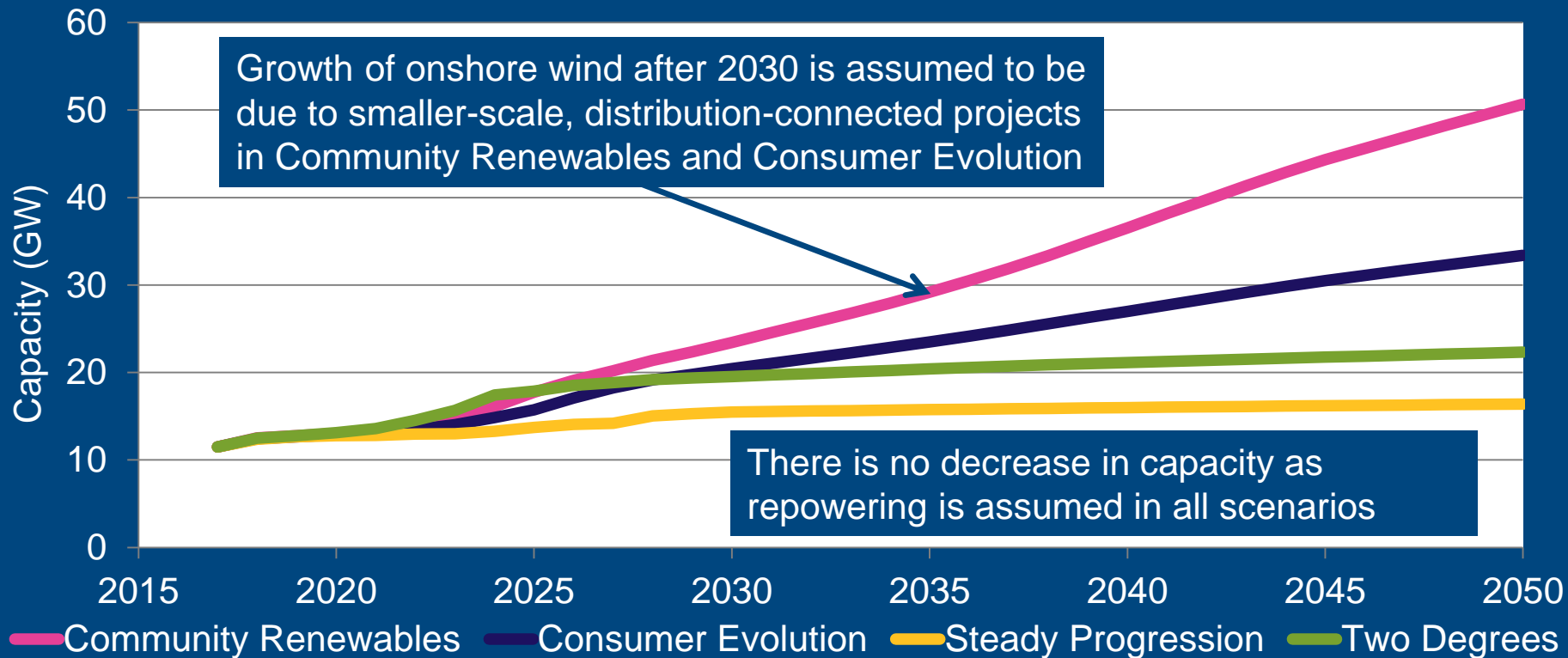


# Offshore wind

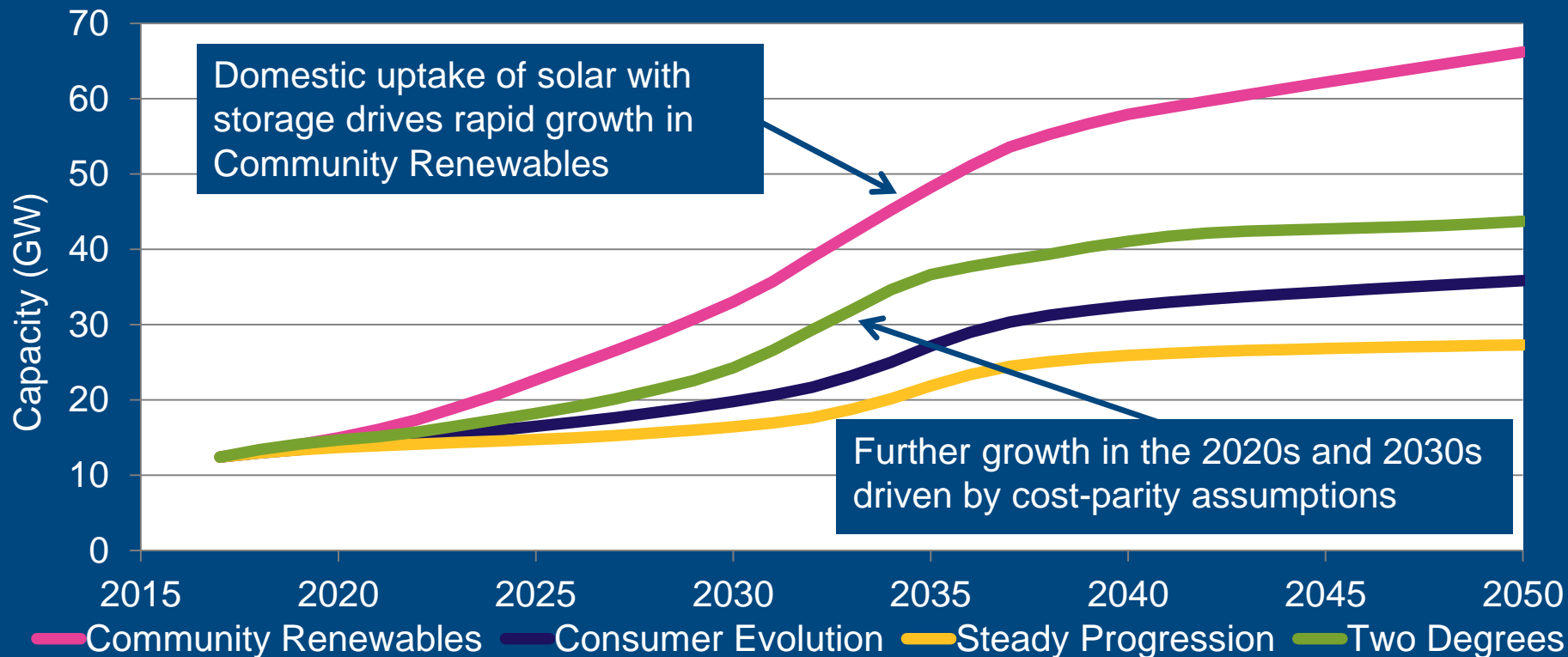




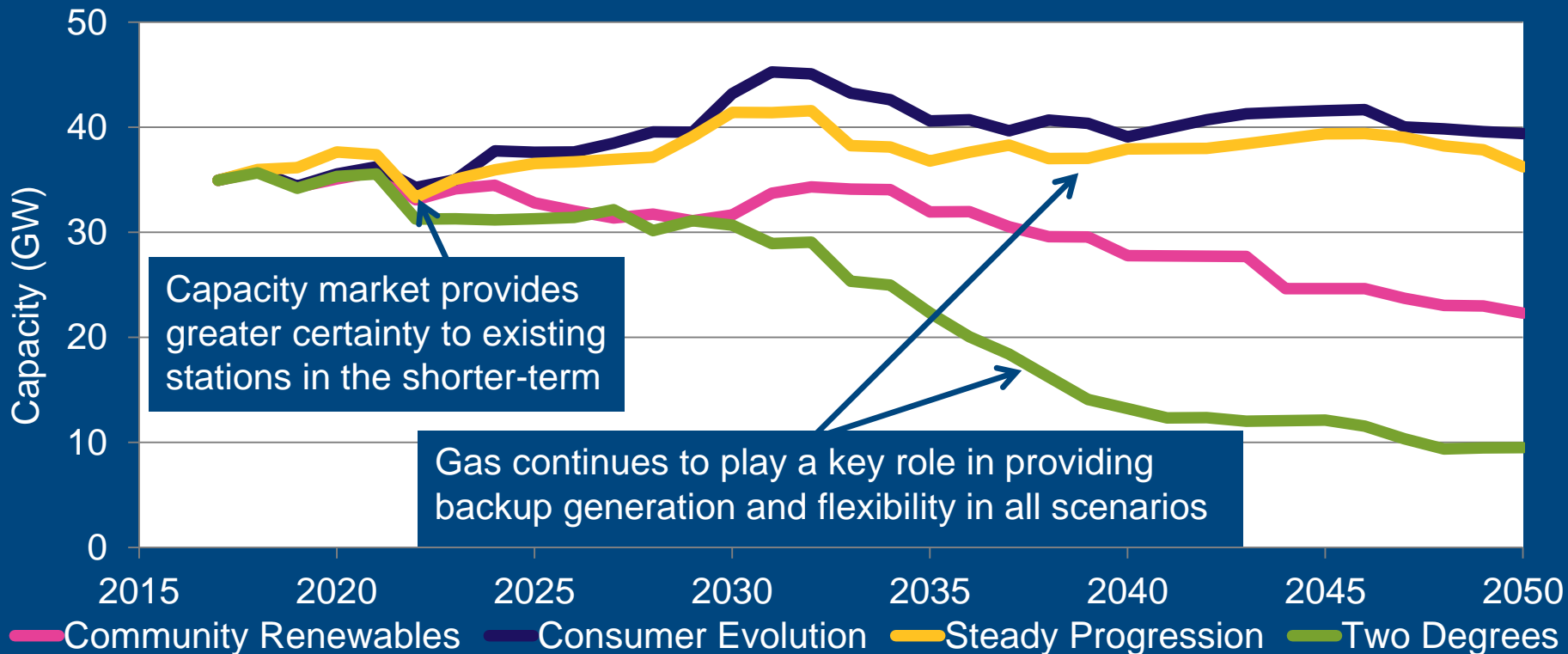
# Onshore wind



# Solar

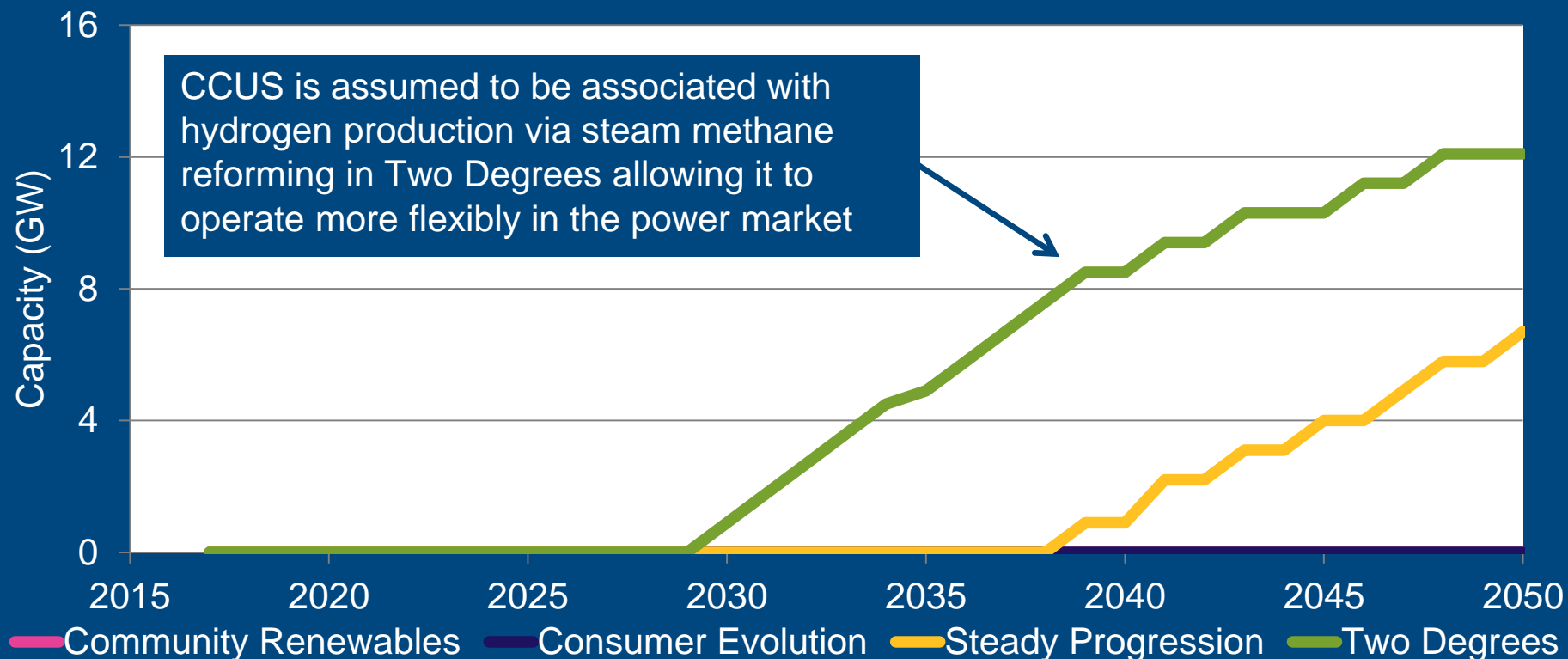


# Gas



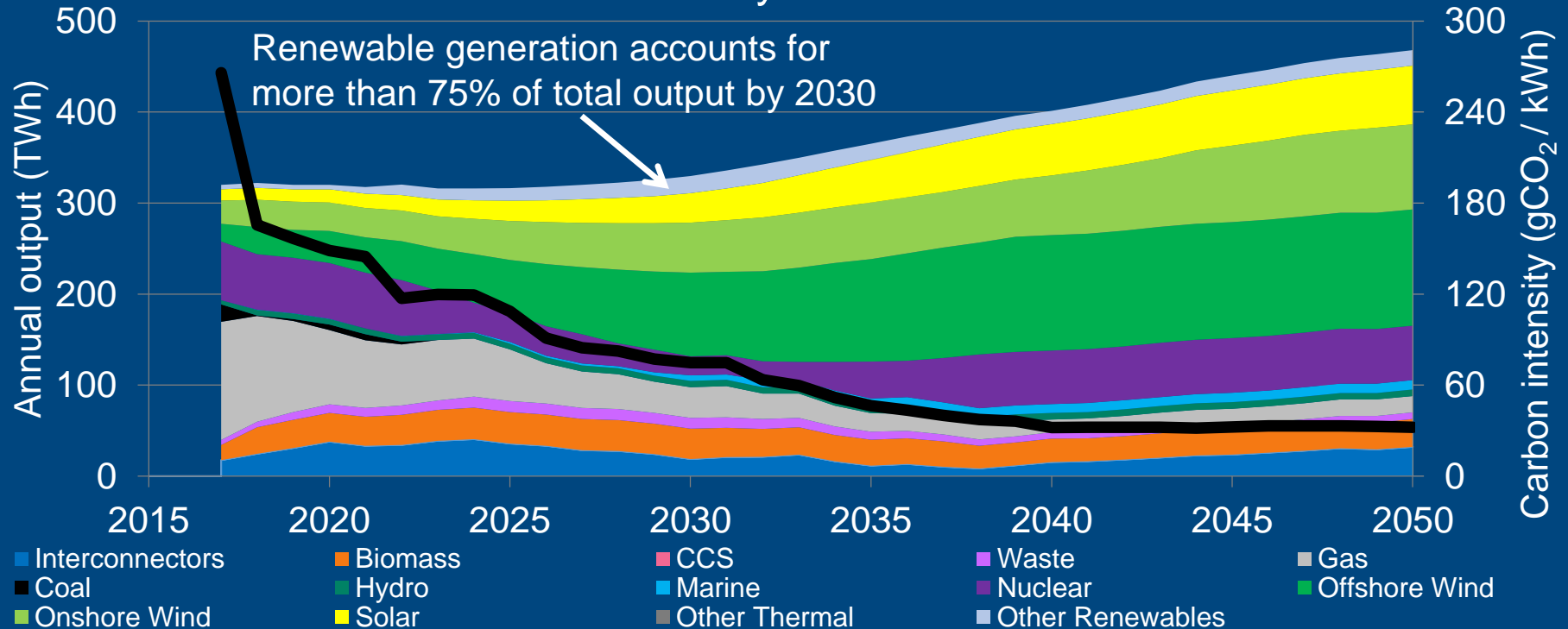
# Carbon capture, utilisation and storage (CCUS)

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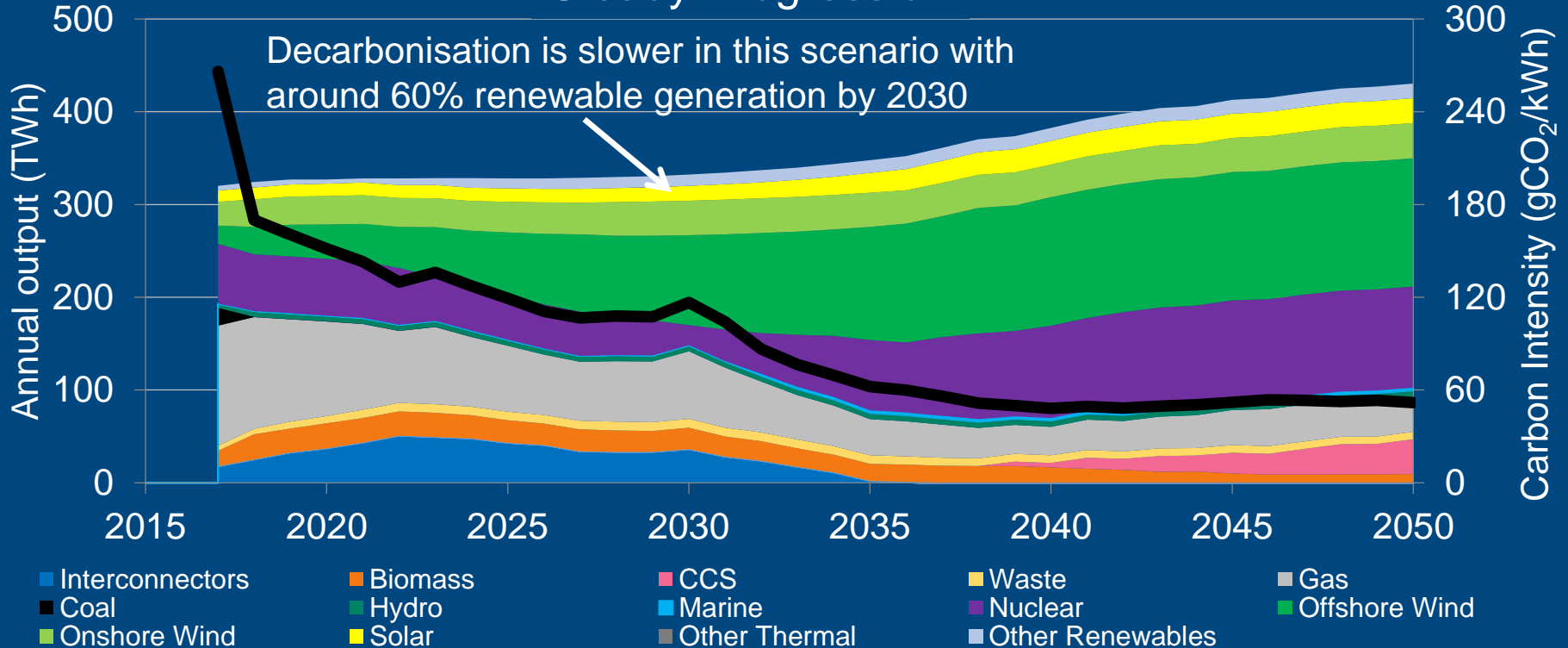
# Generation output

## Community Renewables



# Generation output

## Steady Progression



# Growth of flexibility in 2030

0 GW

5 GW

10 GW

15 GW

20 GW

25 GW

Interconnectors

2017

CE

TD

Battery storage

2017

SP

CR

TD

Large-scale storage

2017

CE

CR

SP

TD

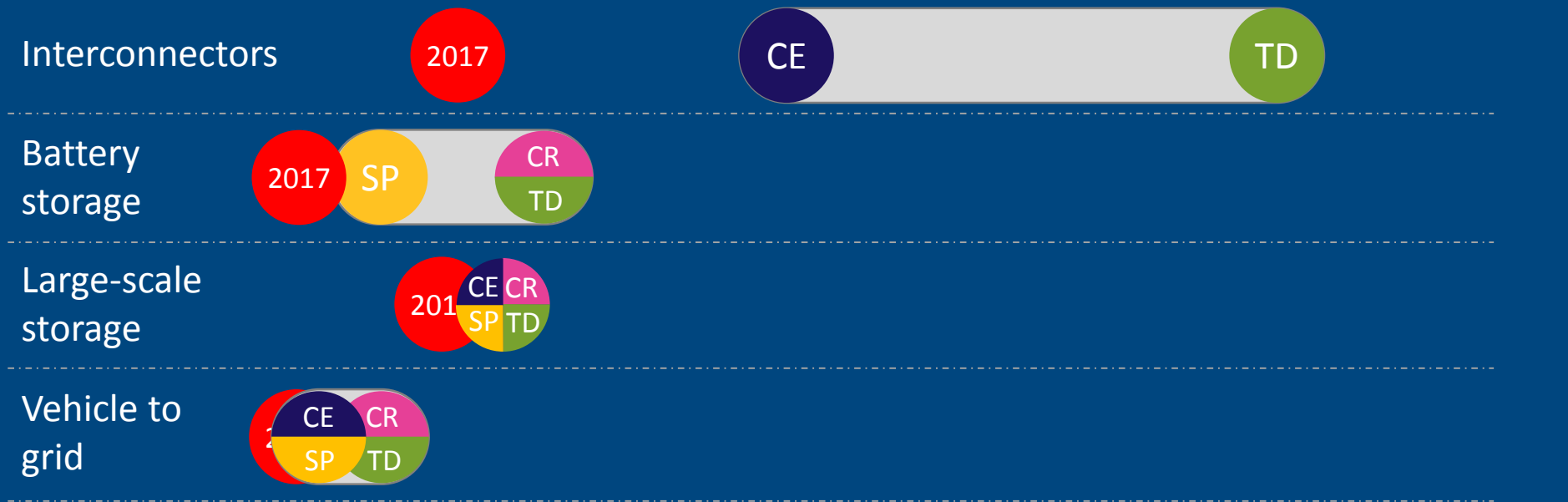
Vehicle to grid

CE

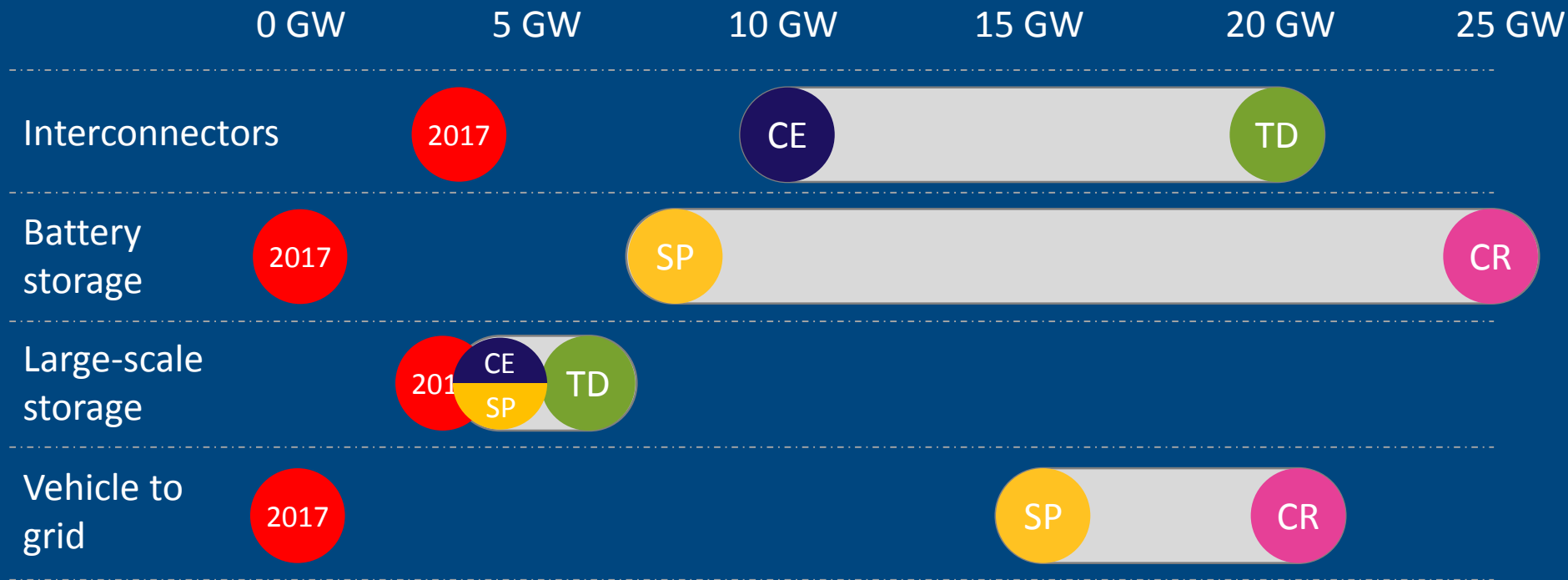
CR

SP

TD

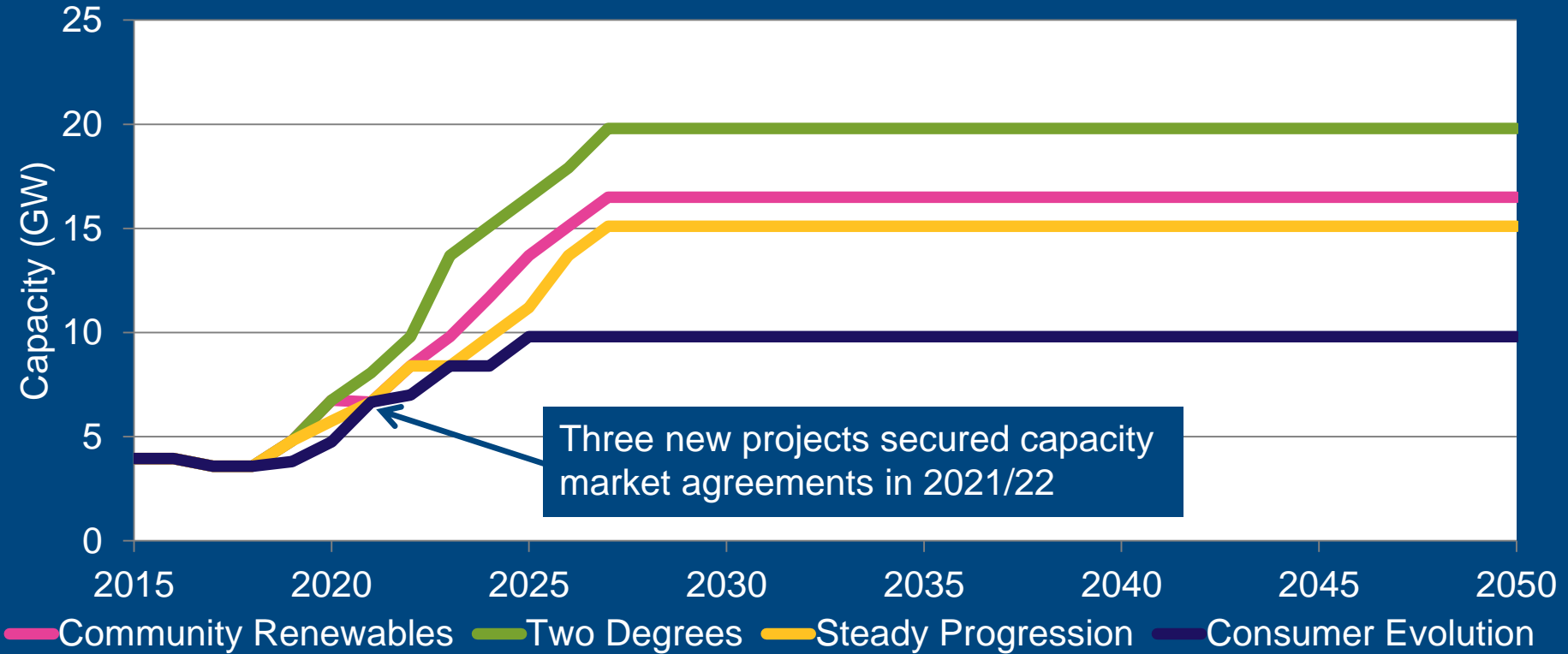


# Growth of flexibility in 2050

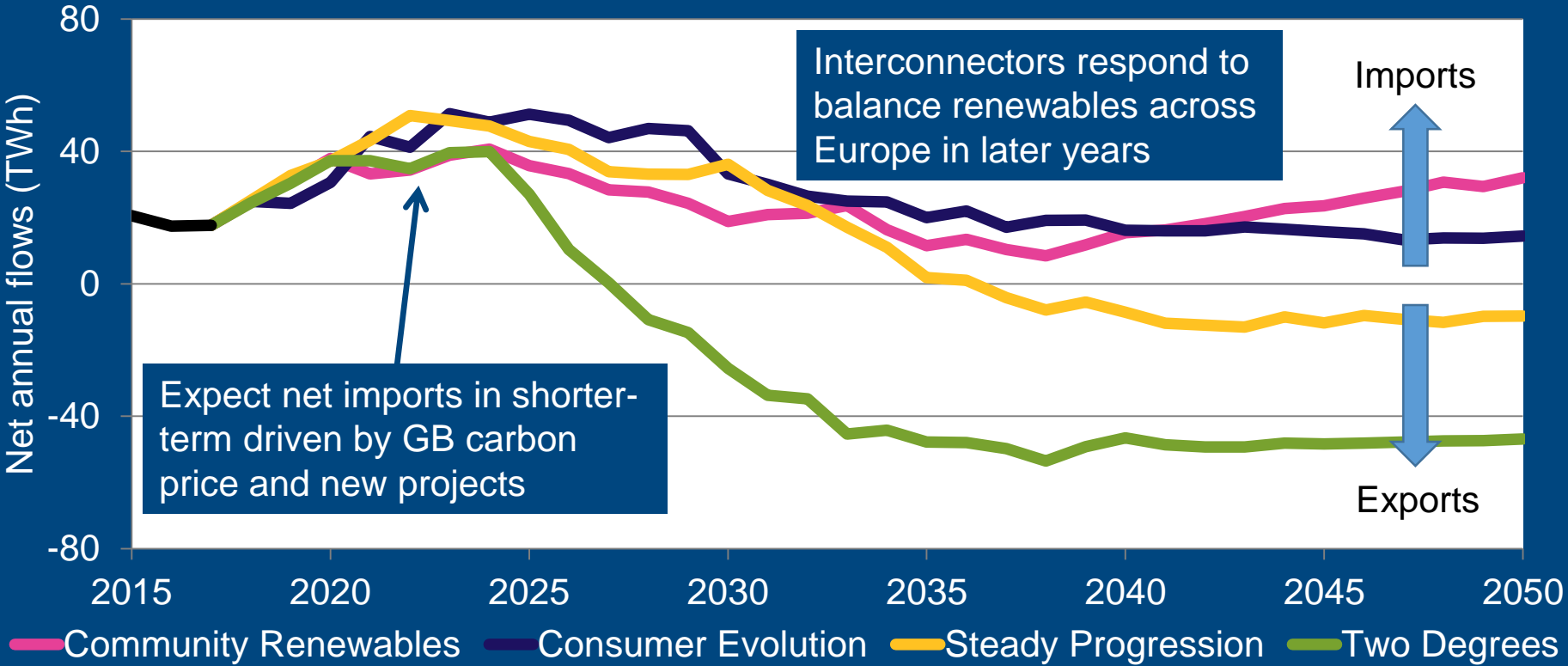




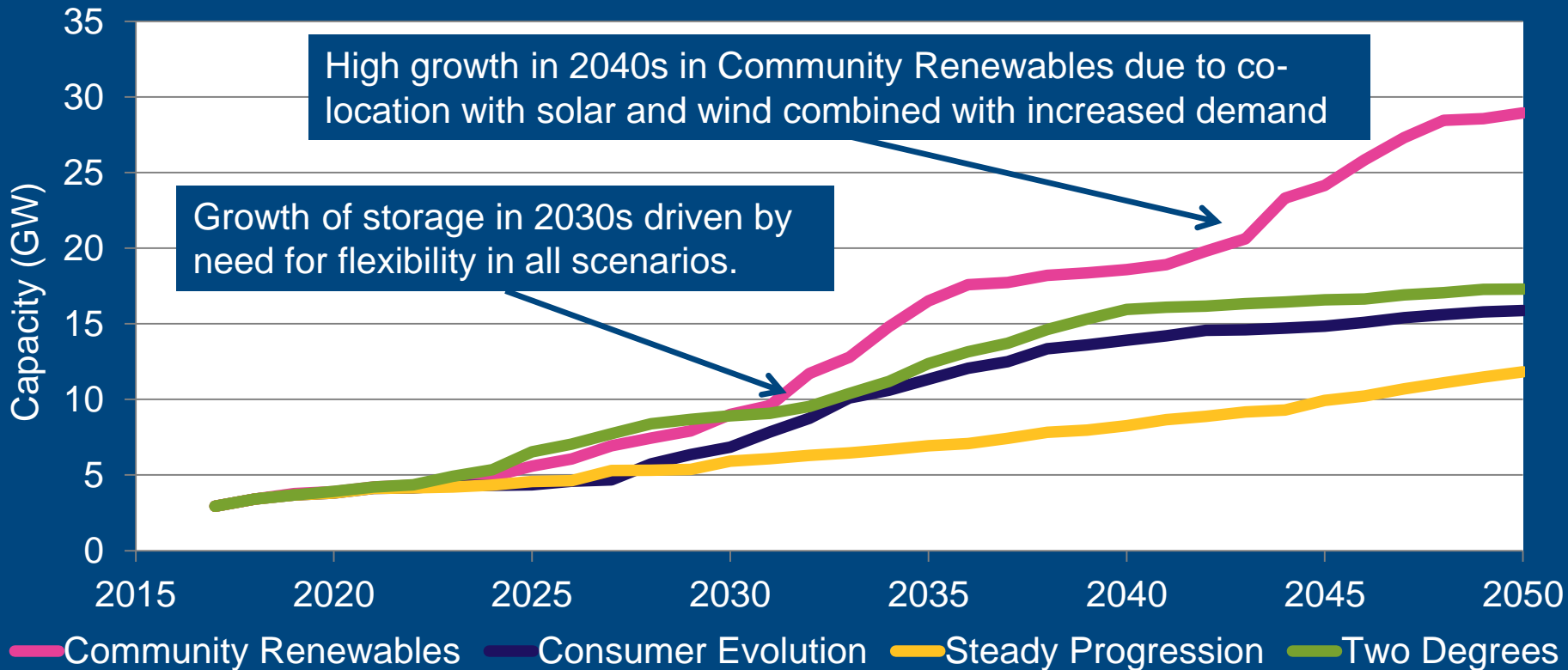
# Interconnectors



# Interconnector flows



# Electricity storage



# Future Events

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Webinars	Dates
FES 2018 Overview	Tuesday 17 <sup>th</sup> July, 10:00-11:00am
Gas Demand	Wednesday 18 <sup>th</sup> July, 10:00-11:00am
Electricity Demand	Wednesday 18 <sup>th</sup> July, 2:00-3:00pm
Gas Supply	Thursday 19 <sup>th</sup> July, 10:00-11:00am
Electricity Supply	Thursday 19 <sup>th</sup> July, 2:00-3:00pm

To join please visit:

<http://fes.nationalgrid.com/webinars/>

# How to stay involved



- FES 2018 launched on 12 July
- FES 2018 webinars during w/c 16 July
- Stakeholder engagement for FES 2019 from autumn 2018
- Keep up-to-date via our website and newsletter

# 2018 Future Energy Scenarios

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## Questions

# Thank you for your time

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Stay in touch: [fes@nationalgrid.com](mailto:fes@nationalgrid.com)

For more information visit: [www.fes.nationalgrid.com](http://www.fes.nationalgrid.com)



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