

# Utility Challenges, Developer Demands

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# Content Warning:

The Following Presentation Contains  
Material That May Be Traumatizing  
To Some Audiences

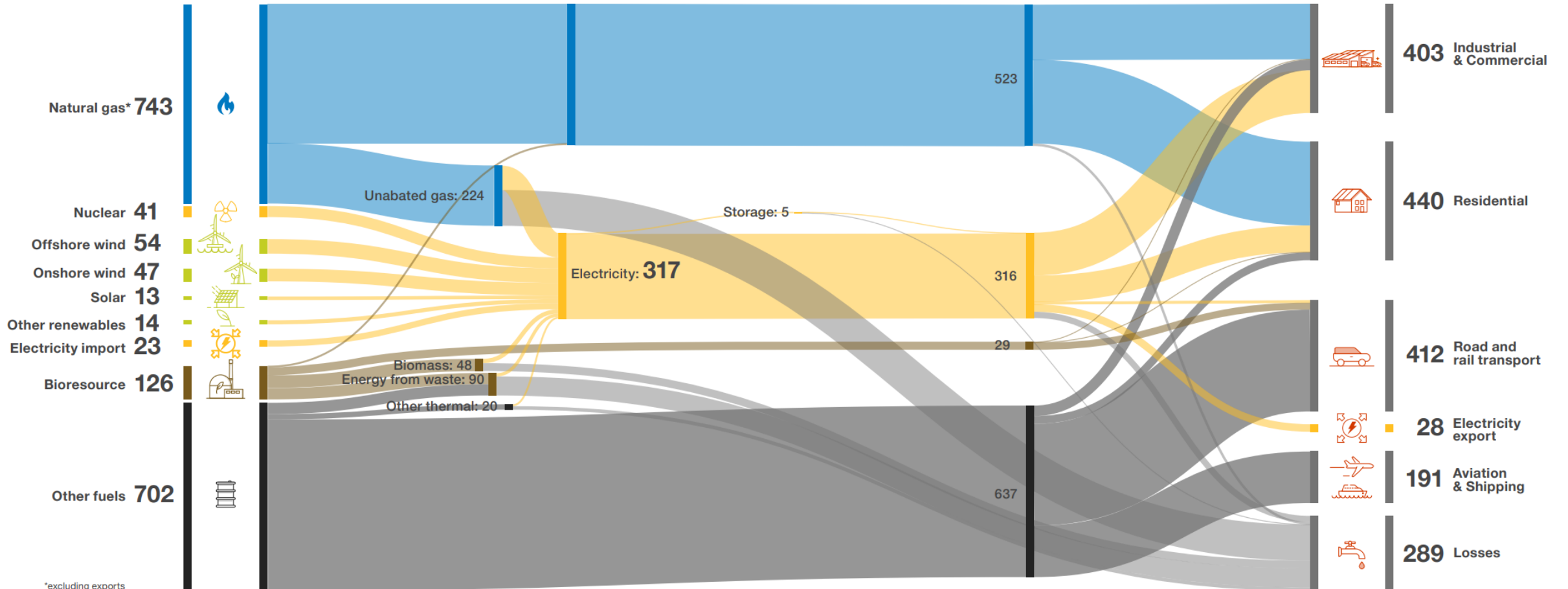
# A year on - where are we?

- Connections on time remains the goal
- Still “small and slow” in the race for electrification
- Interactive POC offers increasing
- Use of NAV water and drainage becoming routine
- Part S and Part R compliance is close to business as usual
- FHS strategies need reviewing
- SME’s still excluded
- Inflation in utilities is high and sticky
- A messy revolution in the supply chain

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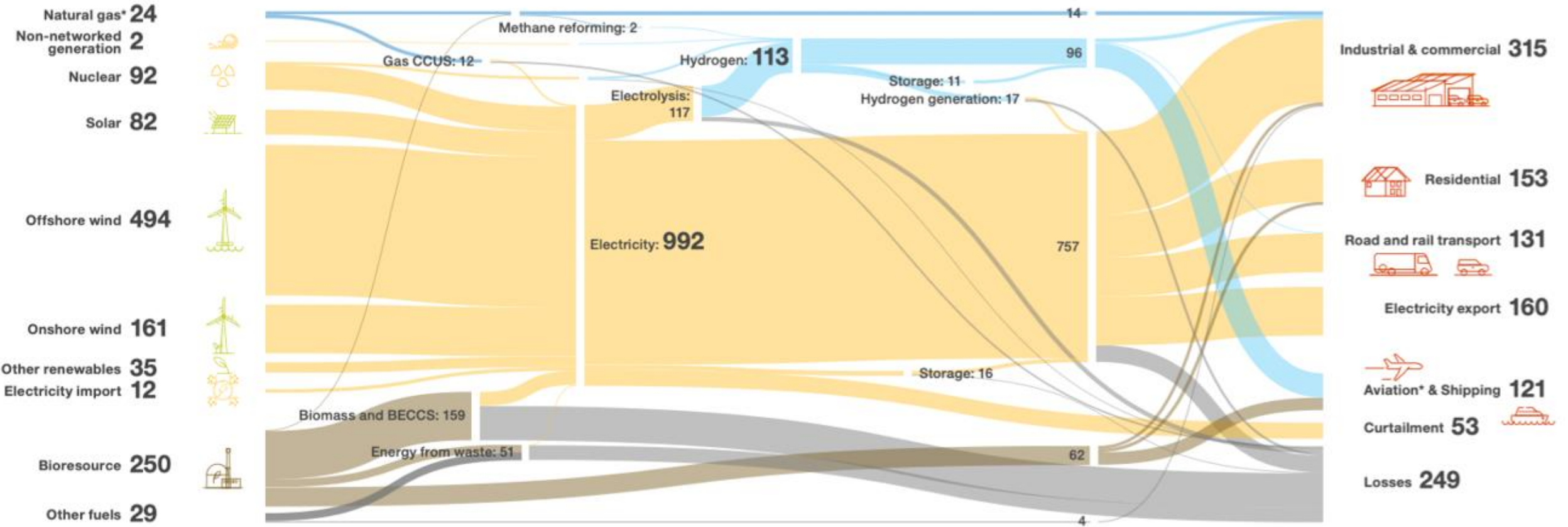
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# Future Energy Scenario – 2022 base



1 Terawatt [TW] = 1 000 000 000 Kilovolt-ampere [kVA]

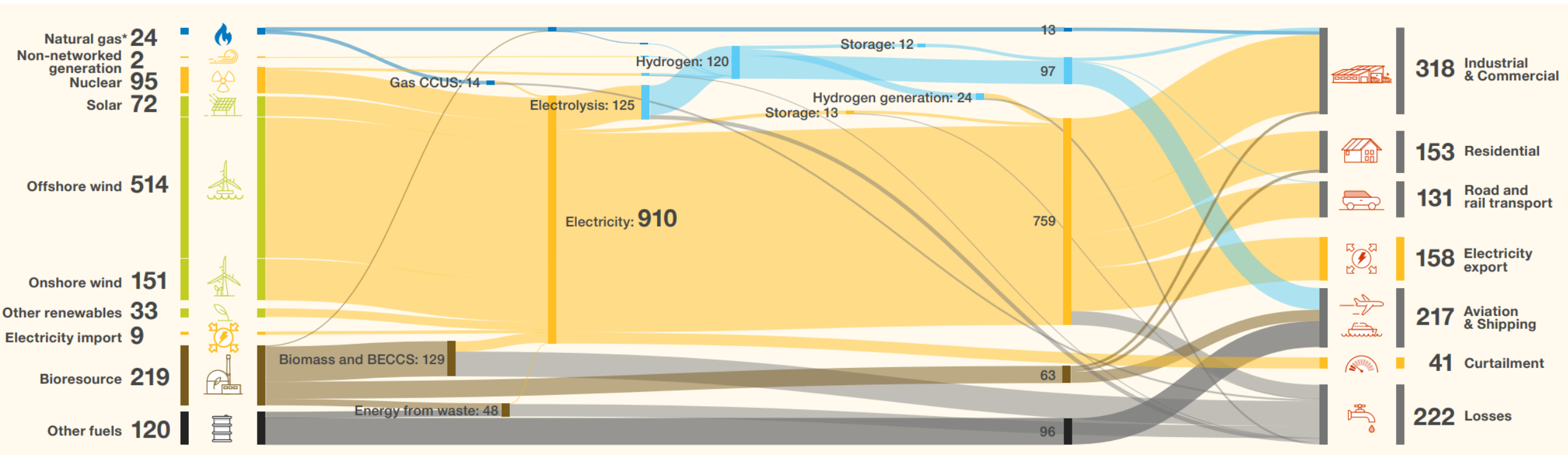
# FES 2050 prediction in 2022



\*excluding exports

\*Aviation excludes some demand met by petroleum products

# FES 2050 prediction in 2023



# Record Breaking

- Grid performances in 2023

Jan 4 <sup>th</sup>	Max zero carbon on network	87.6%
Jan 10 <sup>th</sup>	Max Wind	21.62MW
April 10 <sup>th</sup>	Lowest Grid Carbon	33gCO <sub>2</sub> /kWh
April 20 <sup>th</sup>	Max Solar	10.15MW



# Review of FHS strategy

# Supply chain revolution

- Limited to utilities
- Supported by grid wide changes
- Core of stable providers appearing
- On-plot tech hidden effect on revenue flows / costs
- First projects with new low rise heat solutions
- Scarcity of all skills and resources
- New proposals changing contractual environment
- Private wire smart grids emerging

# Supply chain revolution

- Apply the following tests to any new solutions
  - Customer impact?
  - Commercials?
  - Proven?
  - Business strategy?
  - Control & certainty?
  - Regulated?
  - Front page potential?

# Your to-do list

1. Understand the grid connection risk profile and status of your entire project pipeline
2. Review your FHS plot assumptions now in the light of WIP, Forward sale and private sales rates
3. Review customer impact of your selected utility solutions
4. Comment on the final consultation for the FHS (promised shortly)

Support for people affected by this presentation

If you are affected by any of the issues raised .....

Thank You