

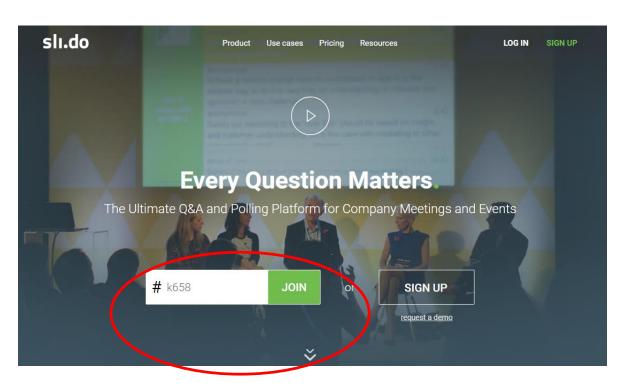
Strategic Network Investment Options East Midlands
13th December 2018



#### Sli.do

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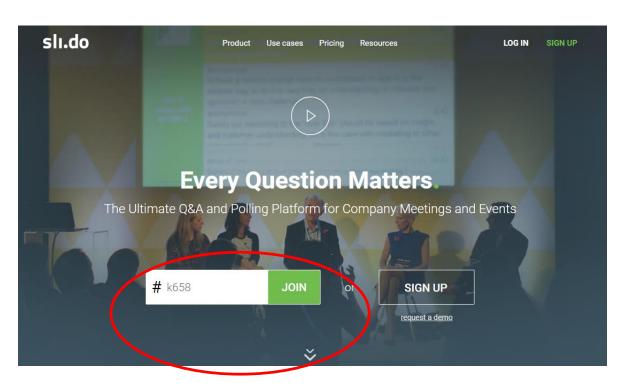
### WELCOME POPPY MALTBY, REGEN



#### Sli.do

#### What do you want to get out of today?

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#### **AGENDA**

10.00 Arrival and registration	10.	.00	<b>Arrival</b>	and	registra	atio
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10.30 Welcome by chair and objectives

Poppy Maltby, Senior Project Manager, Regen

10.35 Investment Strategy overview

Ben Godfrey, Network Strategy Team Manager, WPD

10.50 Generation, storage and demand technology scenarios

Frankie Mayo, analyst, Regen

11.05 Future domestic and commercial developments study

Poppy Maltby, Senior Project Manager, Regen

- 11.20 Break
- 11.30 Roundtable sessions 1. Generation, 2. Electric Vehicles, 3. WPD Network DSO
- 12.25 Feedback from roundtables facilitated by Chair
- 12.30 Summary, next steps followed by lunch & networking



#### Objectives

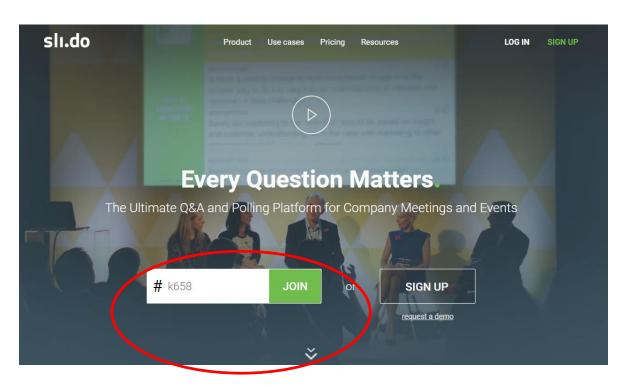


- Explain the process of strategic network investment
- Explain the process and methodology of distribution scenarios
- Present and check initial findings in key areas new developments and generation technologies
- Consult with local stakeholders on how they feel these areas will develop
- Opportunity to feedback directly to WDP

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### STRATEGIC NETWORK INVESTMENT BEN GODFREY, WPD



Strategic Network Investment Options East Midlands
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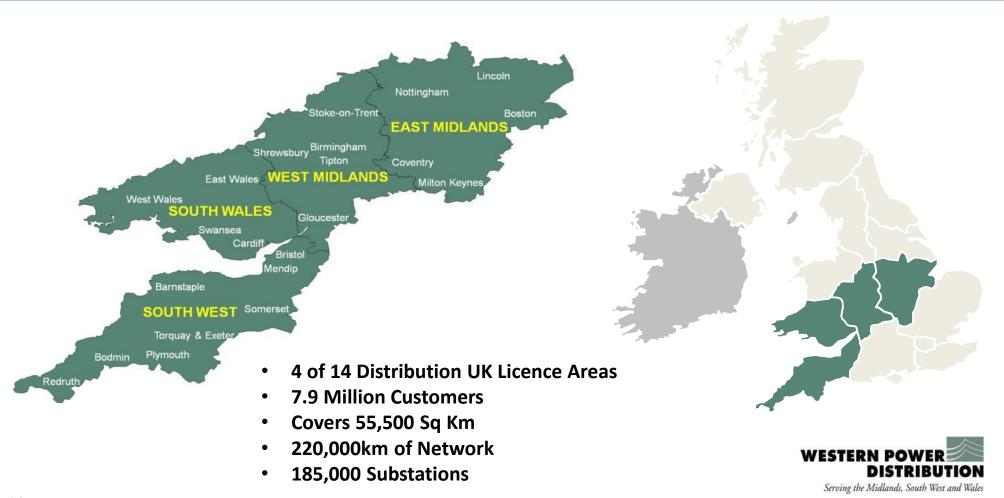
#### STRATEGIC NETWORK INVESTMENT

- Western Power Distribution Who are we?
- Drivers for improved local planning
- Aims and approaches of investment planning work
- Timetable
- What else are we doing to help enable growth?



#### **WPD - OUR AREA**

Western Power Distribution is responsible for distributing electricity to over 25% of the UK. We own, operate and maintain assets between 132kV and 400V.



#### **NETWORK STRATEGY**

WPD's Network Strategy team is responsible for a number of key outputs, contributing to the efficient and economic development of the network from five years out and beyond.

#### Our main focus topics are:

- Developing advanced modelling techniques to inform strategic studies.
- Alignment of our strategic studies with National Grid's FES work, enabling whole system working.
- Progression of a joint WPD/NGET Regional Development Plans.
- National work on developing whole system electricity outcomes through ENA's Open Networks project.
- Delivery of WPD's Distribution System Operability Framework documents.
- Development of WPD's strategy to enable transition to a DSO.
- Assessment of flexibility needs across the WPD region.
- Co-ordination of the responses to Government, regulator and external stakeholder consultations on DSO vision and strategy.

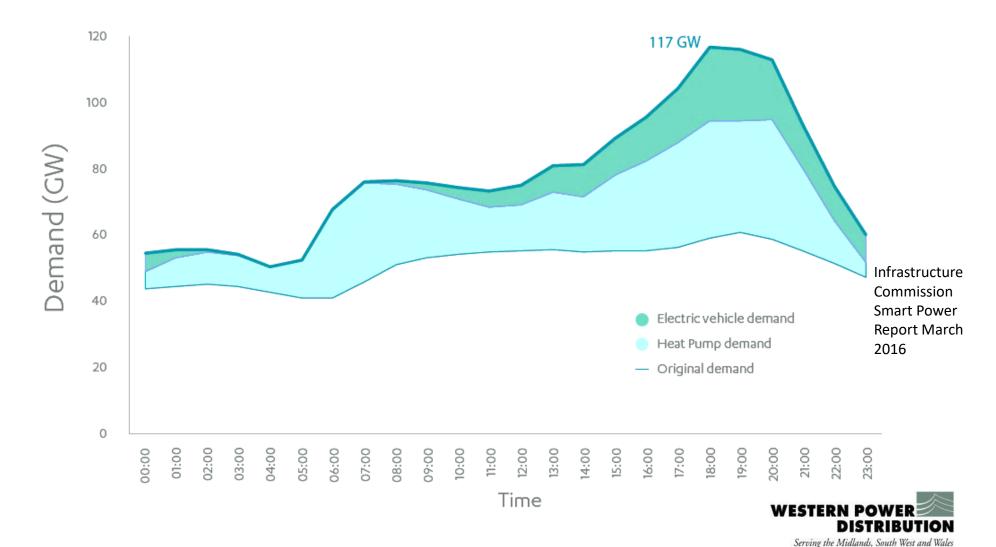
#### THE NEED FOR DEVELOPING OPTIONS

- Uncertainty in the future path of demand & DG growth
- Variability and volatility in network flows increasing; usage patterns changing; new technologies
- 14GW Winter Peak; 21GW DG, 12% of Energy
- Significant changes in energy system operation: need for coordination if growth is to be achieved economically
- Ofgem wanting to understand the value to the wider customer base if they were to fund strategic reinforcement
- Need to understand whether there are 'no/low regret' investment options
- What does Brexit mean for renewables, LCTs and electrical self sufficiency?



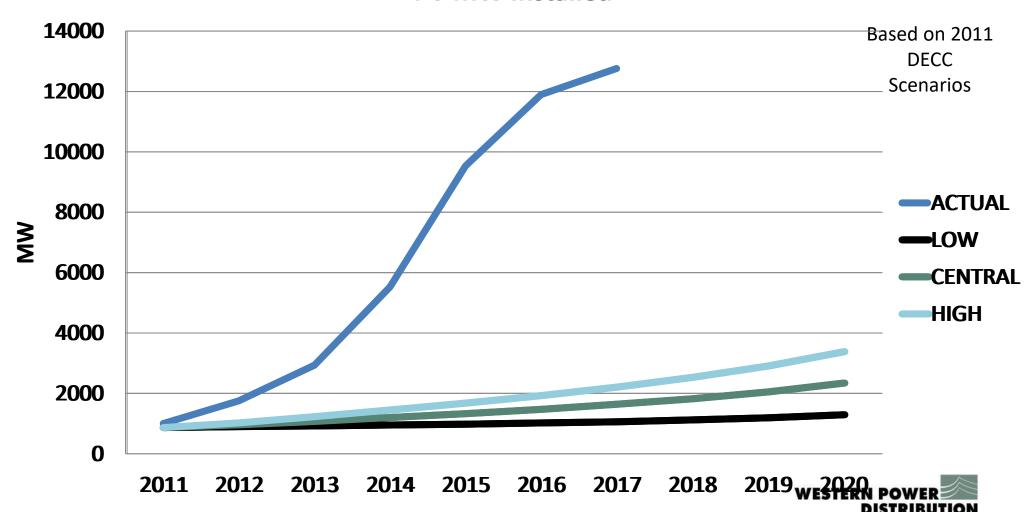
#### **CHALLENGES OF PASSIVE NETWORKS**

Possible future daily demand scenario with sub-optimal power system<sup>10</sup>

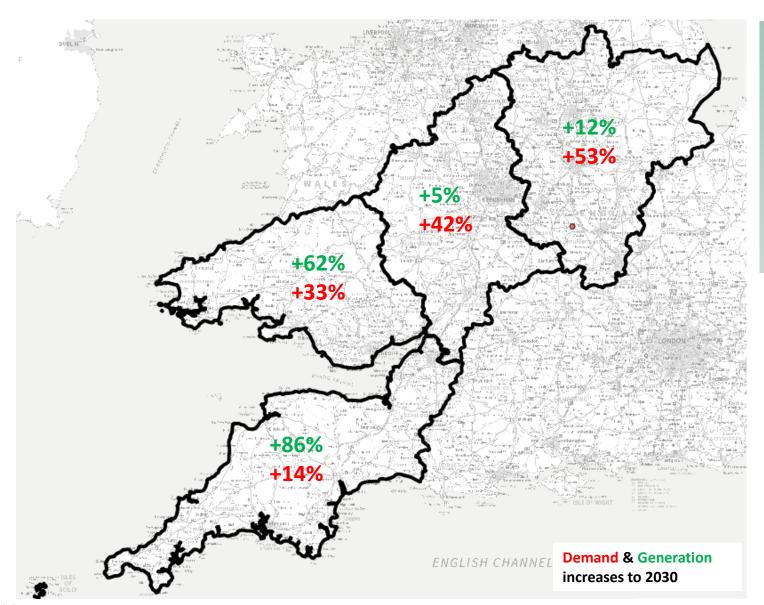


#### **DER GROWTH IS HARD TO PREDICT**

#### **PV MW Installed**



#### **REGIONALLY SPECIFIC PLANNING**



Our growth
scenarios out to
2030 show that both
demand and
generation are
expected to grow
significantly in all
regions.



#### **CURRENT EAST MIDLANDS DG DATA**

Generator type	Connected [MVA]	Accepted [MVA]	Offered [MVA]	Total [MVA]	Enquired [MVA]
Photovoltaic	1,284	732	128	2,144	246
Wind	604	55	-	659	_
Landfill Gas, Sewage Gas, Biogas and Waste Incineration	200	141	13	354	3
СНР	183	31	15	229	11
Biomass and Energy Crops	93	111	0	205	-
Hydro, Tidal and Wave Power	2	7	1	10	-
Storage	35	500	26	561	6
All Other Generation (inc Mixed)	1,218	682	192	2,091	78
Total	3,619	2,259	375	6,253	344

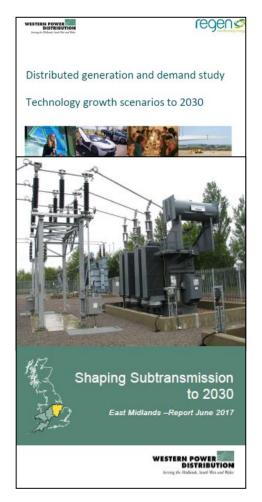


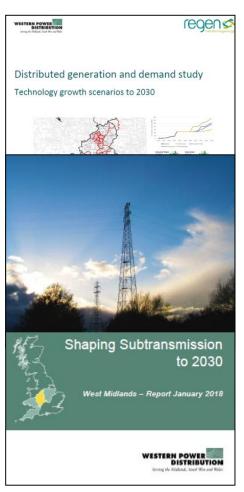
#### **AIM OF THE STUDY**

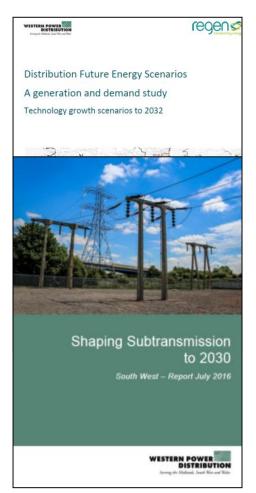
- Assessing the potential growth of customer demand and LCT uptake by type, general location and year
- Identifying thermal, voltage and fault level constraints that result
- Ensuring security of supply is maintained
- Assessing options for conventional reinforcement
- Providing recommendations for 'low regret' investment and identifying the cost and timescale of these
- Use this to understand the economic potential for demand side response and/or generation constraint to avoid reinforcement
- Begin to attach 'Energy' figures to future flexibility required

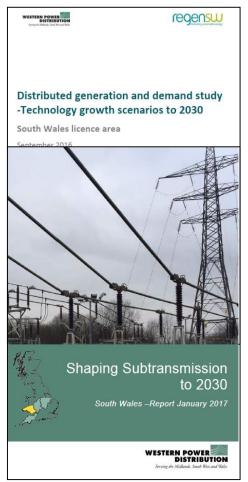


#### **PREVIOUS OUTPUTS**





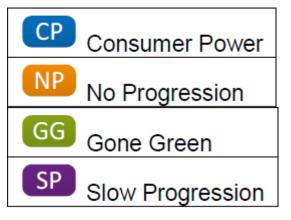






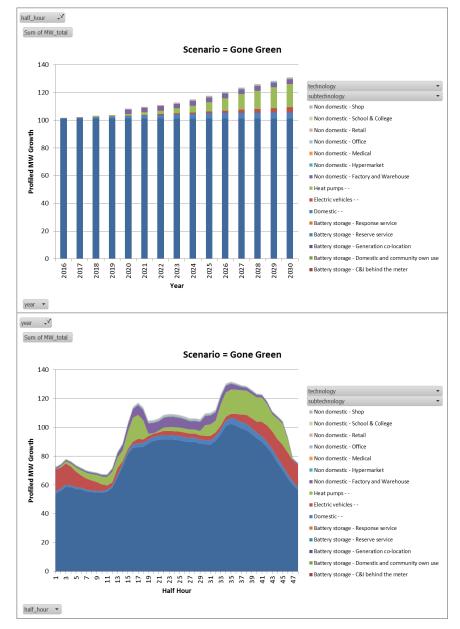
#### **OUTPUTS OF THE STUDY**

GSP	2020				2025			
Bishops Wood			СР	GG	NP	SP	CP	GG
Bushbury							CP	GG
Bustleholm							СР	GG
Cellarhead					NP	SP	СР	GG
Feckenham	NP	SP	СР	GG	NP	SP	СР	GG
Iron Acton								
Ironbridge and Shrewsbury			СР	GG			СР	GG
Kitwell							СР	GG
Lea Marston/Hams Hall			СР	GG	NP	SP	СР	GG
Nechells	NP	SP	СР	GG	NP	SP	СР	GG
Ocker Hill							СР	GG
Oldbury								
Penn						SP	СР	GG
Port Ham/Walham			СР	GG	NP	SP	СР	GG
Rugeley			СР	GG	NP	SP	СР	GG
Willenhall				GG		SP	СР	GG

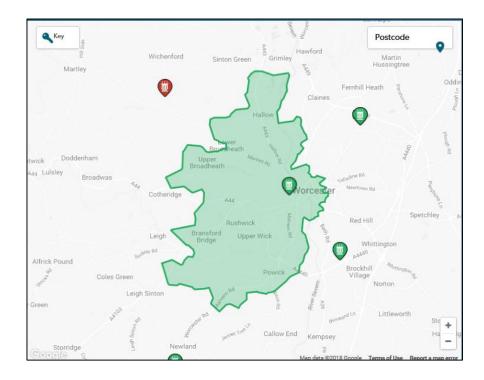




#### **OUTPUTS OF THE STUDY**



We have build a bottom-up understanding of demand and generation growth out to 2030 across 260 individual zones within our region and share this information.





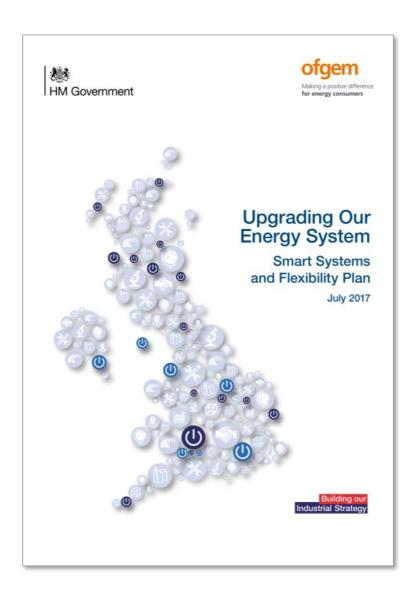
#### TIMETABLE FOR STRATEGIC STUDIES

December 2018	Stakeholder workshop to get stakeholder input to approach and scenarios to be considered.
Q1 2019	Undertake network studies and identify solutions with costs
Q2 2019	Sensitivity work to analyse how much 'headroom' do the potential solutions give.
Q2 2019	Assess potential for demand response/generation to alleviate constraints
July 2019	Complete report and publish on our website

Dissemination event by webinar – 15th August 2019



August 2019



### ofgem

"If we take advantage of the opportunities, we can create new businesses and jobs, empower consumers and help people save up to £40bn off their energy bills in the coming decades"



#### **DSO TRANSITION**

## Distribution Network Operator

Passive networks managing maximum power flows



Distribution<br/>System<br/>Operator

Active networks managing real-time energy flows

Existing

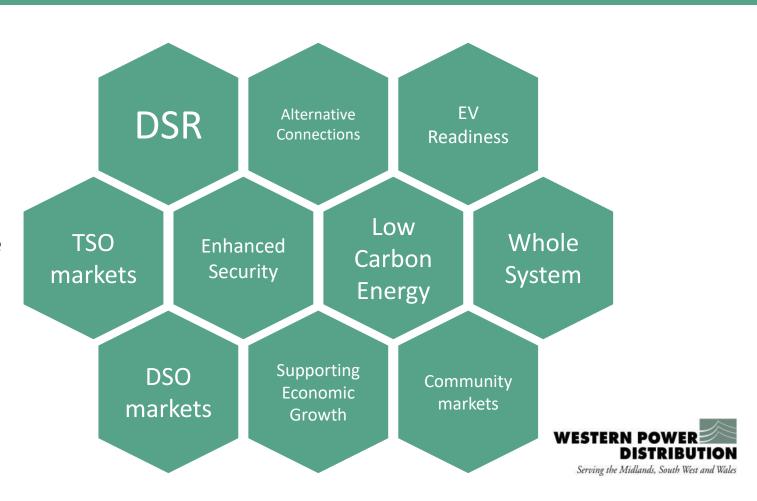
- Develop and maintain an efficient, co-ordinated and economical system of electricity distribution
- Facilitate competition in electricity supply, electricity generation

New Roles

- Facilitate flexibility services
- Improve the resilience and security of the electricity system at a local level
- Facilitate neutral markets for more efficient whole system outcomes
- Drive competition and efficiency across all aspects of the system
- Promote innovation, flexibility and non-network solutions

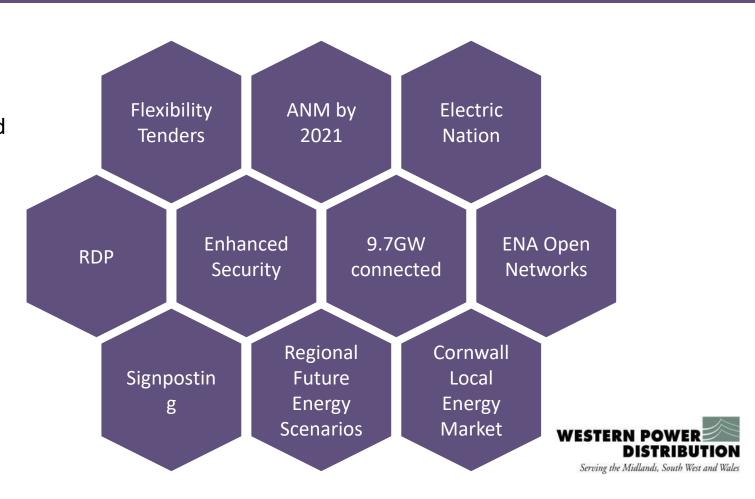
Traditional DNO operations would require very substantial investments in passive grid infrastructure, which would be underutilised much of the time.

A smarter, more flexible energy system will enable customers to be able to actively participate in new flexibility markets through a variety of pathways.



We are already beginning to more actively manage our networks and transition to DSO. We will continue to invest in our capability to deliver smarter, more flexible networks.

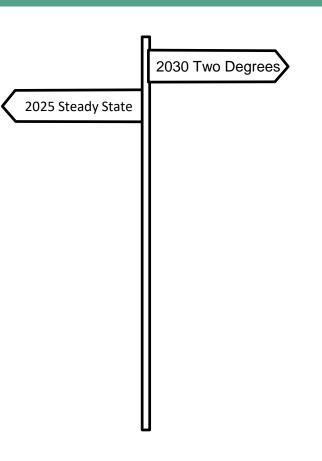
Our DSO Strategy and innovation projects are already building our capability

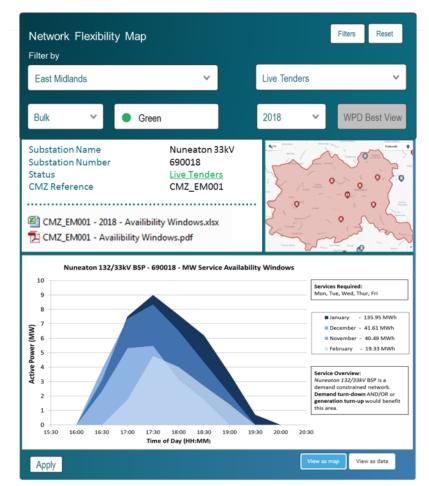


- WPD is becoming more active in its approach to network operation:
  - Active Network Management rolling out across all network
  - Extending ANM to demand and storage customers
  - Transparency with our data
- Revenue streams for DSR/flexibility services DSO requirements will be predictable and forecast in advance.
  - Revenue from demand 'turn up'/'turn down' services
  - Revenue from generation 'turn up'/'turn down' services
  - Revenue from storage energy shifting services
  - Revenue from demand shifting/influencing
  - Revenue from reactive power support
- Quicker, more efficient connections for customers willing to become active energy system participants



In February we will continue to signpost our DSO flexibility requirements for all licence areas. Our service products are designed to align with the ESO's Reserve products, increasing the potential value for DSR providers.





WPD's signposting information will direct flexibility providers to the different distribution system needs required under a range of scenarios and timings.

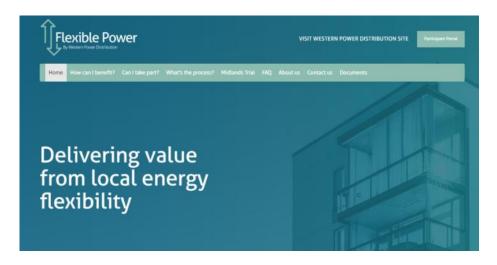
www.westernpower.co. uk/network-flexibilitymap



#### How we procure

- Through Flexible Power, a WPD customer-facing brand
- Full information on website: www.flexiblepower.co.uk
- Previous Expression of Interest documents and results
- API for interfacing with available for download
- Contractual frameworks published







#### **Timeline**



**Expression of Interest** 

Early February 2019



**Procure** 

Mid February to March 2019



**Build and Test** 

April to May 2019

**Two Year Contracts** 



Operate

June 2019 to May 2021

We will follow a 6 monthly procurement cycle, bringing on new flexibility zones and ensuring we meet all our system needs



Flexibility can provide alternatives to reinforcement and benefits to the whole electricity system

Generators seeking connections

Demand seeking connections

Storage seeking connections

Flexibility providers seeking a revenue

Flexibility can be shared across the transmission boundary to access National Markets



#### **FURTHER COLLABORATION**

All our reports, webinars and presentations are published online at: <a href="http://www.westernpower.co.uk/netstrat">http://www.westernpower.co.uk/netstrat</a>

If you have any questions in relation to WPD's Network Strategy work, please contact WPD on the details below:

Email: wpdnetworkstrategy@westernpower.co.uk

#### By post:

Network Strategy Team
Western Power Distribution
Feeder Road
Bristol
BS2 OTB













# DISTRIBUTED GENERATION AND DEMAND STUDY TO 2032 FRANKIE MAYO, REGEN

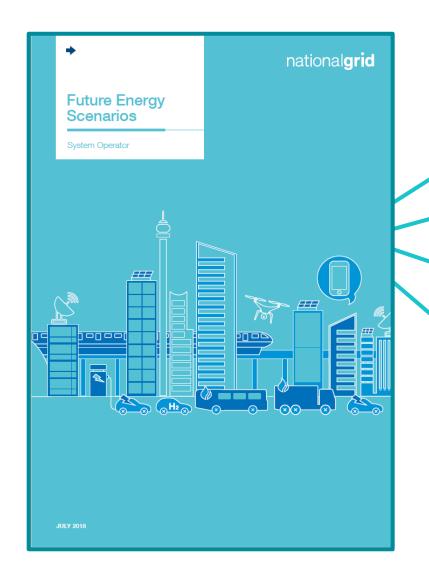


## Scenarios overview

#### Scenarios overview

- Future energy scenarios framework
- Energy generation technologies
- Geographic scope

#### National Grid - Future Energy Scenarios 2018



4 scenarios: varying levels of decarbonisation and decentralisation



### Technologies in the scope:

### Supply

Distributed electricity generation technologies

Solar PV (rooftop and ground-mounted)

Onshore wind

Hydropower

Energy from waste (incineration and ACT)

Anaerobic digestion

Diesel and gas generation

### **Demand**

Disruptive electricity demand technologies

Electric vehicles

Heat pumps (hybrid and single systems)

Air conditioning - domestic

New build developments (domestic)

New build developments (non-domestic)

### Storage

Electrical energy storage at distribution level

Response services

Reserve services

**Energy trader** 

High energy user (behind the meter)

Own use and community

Co-location

### Geographic scope

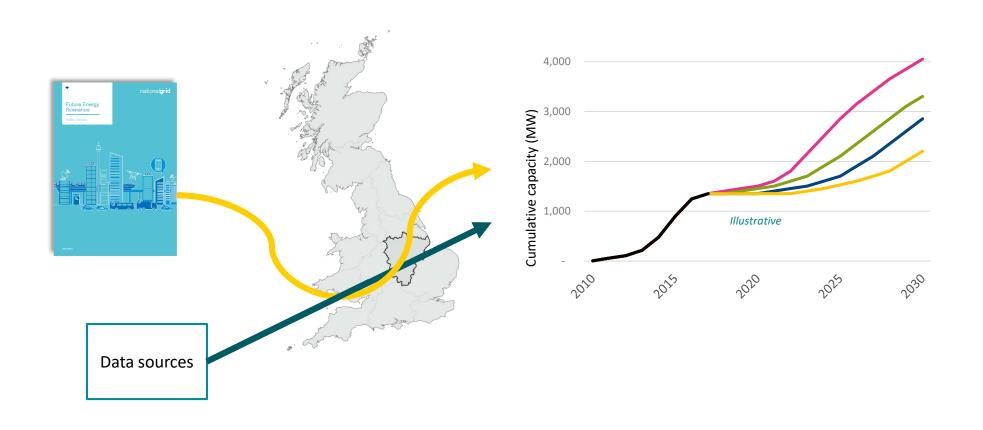


### Scenarios recap

- The range of futures in the FES framework
- Our technology focus: supply, demand, and storage
- The geographic scope

## Methodology

### Methodology overview



A 'bottom-up', stakeholder-informed, set of future energy scenarios for the East Midlands licence area

### Scenarios methodology overview

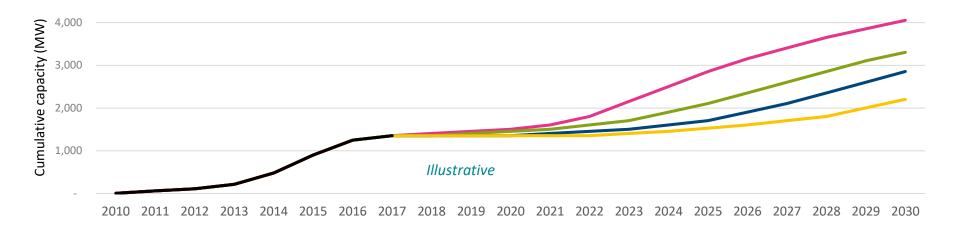
#### 1. Baseline



### 2. Pipeline



### 3. Projections



#### Current baseline sources:

- WPD connection data
- Regen database
- FIT data
- ROC data
- plus other publicly available data.
- You !



#### Pipeline projection:

Analysis of current projects in the planning system and with grid connection agreements for large scale technologies. Dependent on technology when the pipeline goes out to.

### Scenario projections (to 2032):

Growth scenarios based on National Grid's four FES 2018 scenarios—applied at a local level informed by:

- Historic and emerging local trends
- · Local factors
- Resource assessments
- Stakeholder engagement

### Methodology recap

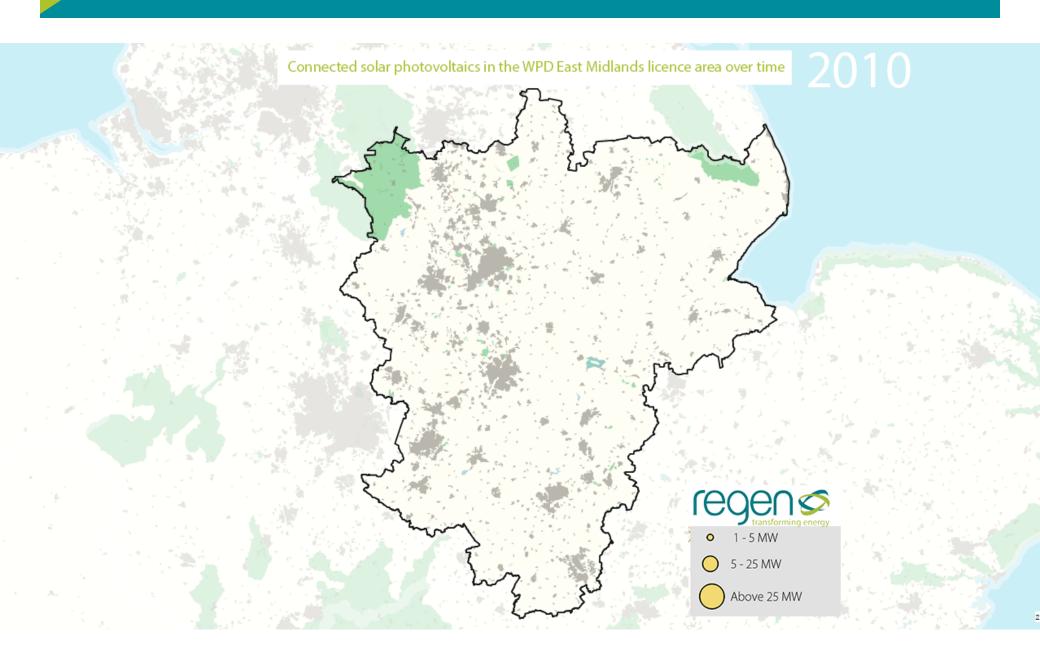
- Overview of our methodology for creating the future projections
- Breaking down the 'when?' question, into baseline, pipeline, and projected connections
- The regional spatial factors we are considering

# The East Midlands energy story



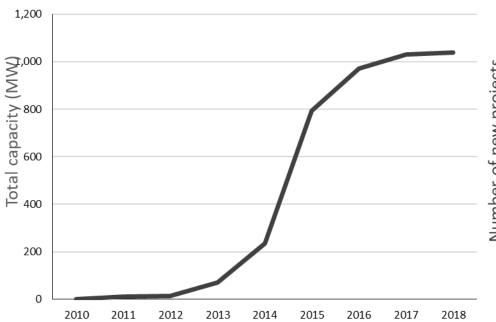
### Ground mounted solar

### Ground mounted solar

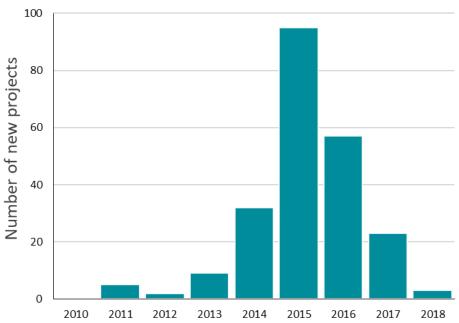


#### Ground mounted solar

Distribution network connected ground mount solar PV capacity in WPD East Midlands licence area

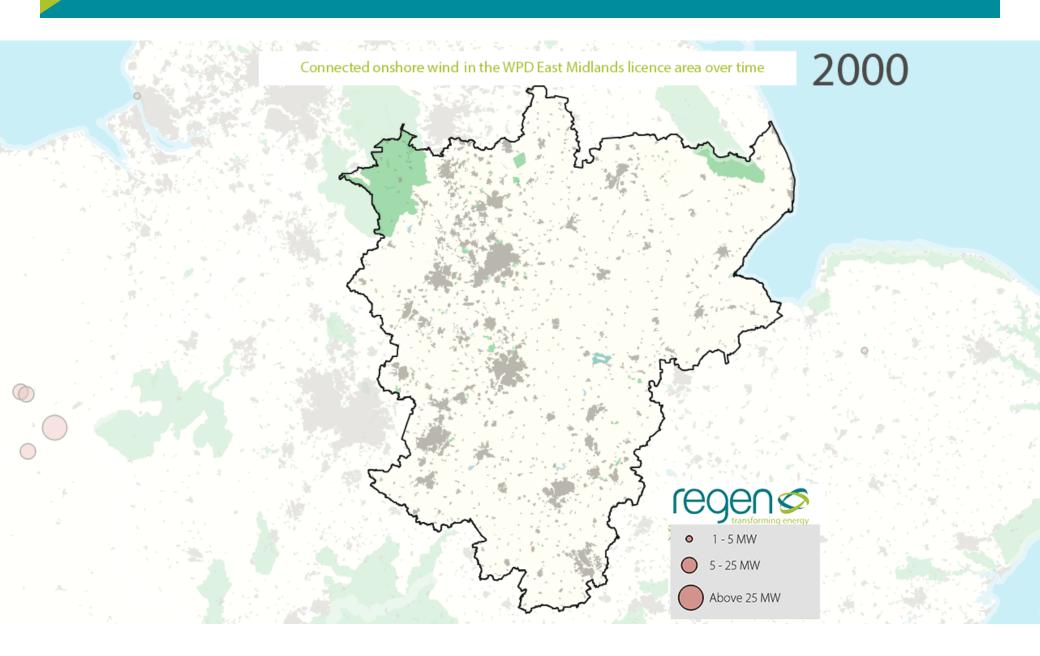


## Number of distribution network connected ground mount solar PV projects per year in WPD East Midlands licence area



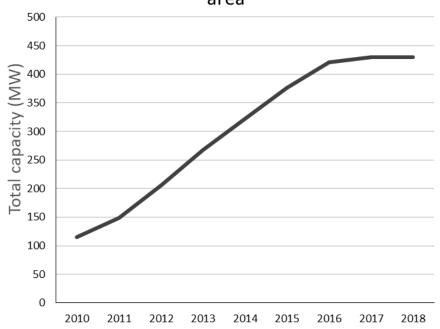
### Onshore wind

### Onshore wind

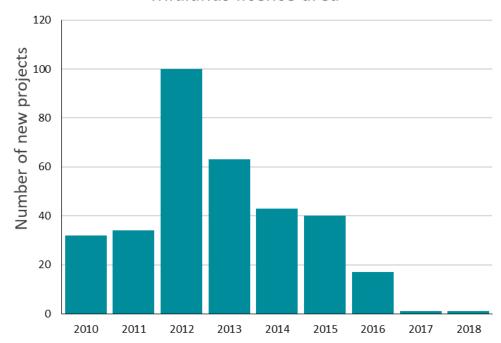


### Onshore wind

Distribution network connected wind capacity in WPD East Midlands licence area



# Number of distribution network connected onshore wind projects per year in WPD East Midlands licence area



### Electric vehicles: methodology



Projected and assessed through a combination of FES 2018 scenarios and our Regen model

# Range of vehicle types

Cars	PEVs
	PHEVs
LCV <sub>o</sub>	PEVs
LGVs	PHEVs

**HGVs** 

Buses and coaches

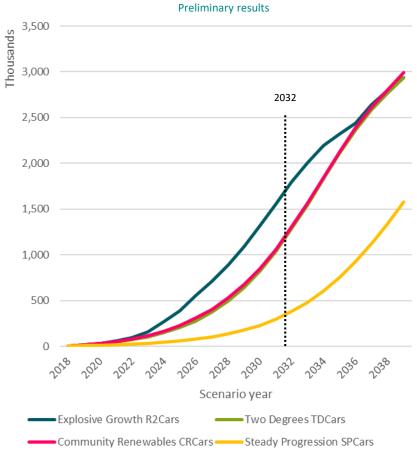
Motorcycles

### Electric vehicles: results

#### Preliminary results for Battery-electric cars

Scenario	Baseline	2025	2032		
Community Renewables		229,000	1,302,000		
Two Degrees		205,000	1,282,000		
Consumer Power	5,500	57,500	364,000		
Steady Progression		59,000	379,000		
Regen 'Explosive' growth		388,500	364,000		

### Growth of Battery electric cars in the WPD East Midlands licence area



### Electric vehicles: spatial distribution

### Spatial distribution:

#### Our weightings include:

- Availability of off-street / on-street parking
- Current distribution of vehicle types
- Commercial properties
- Distribution of multi-car households
- Car park distribution
- Depots, distribution centres

# Range of vehicle types

Cars	PEVs					
	PHEVs					
101/2	PEVs					
LGVs	PHEVs					

HGVs

Buses and coaches

Motorcycles

#### Heat pumps: overview

#### **Installation type:**

Domestic (on-gas grid)

Domestic (off-gas properties)

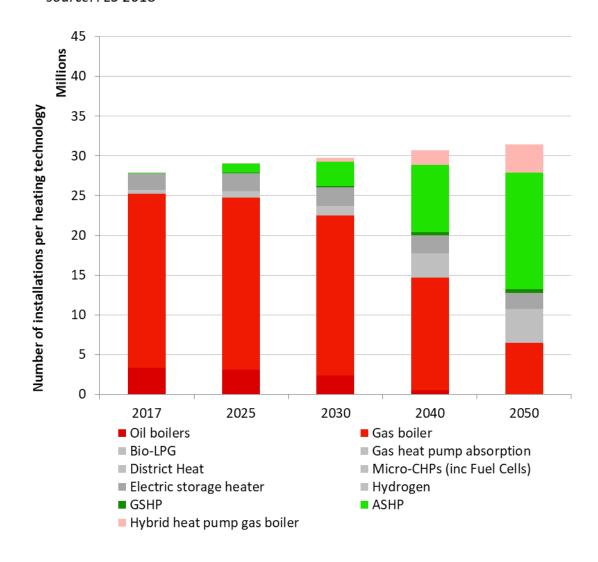
New homes (building on the new developments studies)

#### Technology type:

Single heat pump system (i.e. electric back-up)

Hybrid heat pump (i.e. gas back-up)

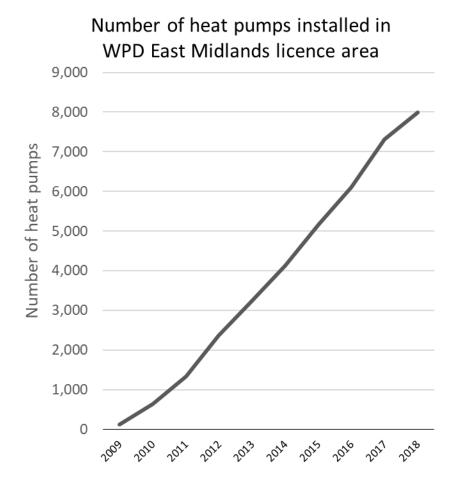
Domestic heat technologies under Community Renewables source: FES 2018



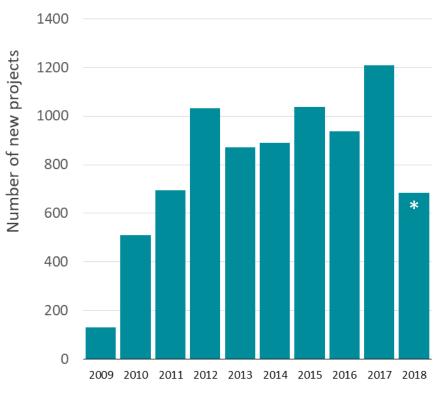
#### Heat pumps: results

#### Our growth factors include:

Government regulation on domestic heating with priorities varying for on-gas and off-gas properties, building regulations, subsidy, cost reductions, economic growth, new home developments



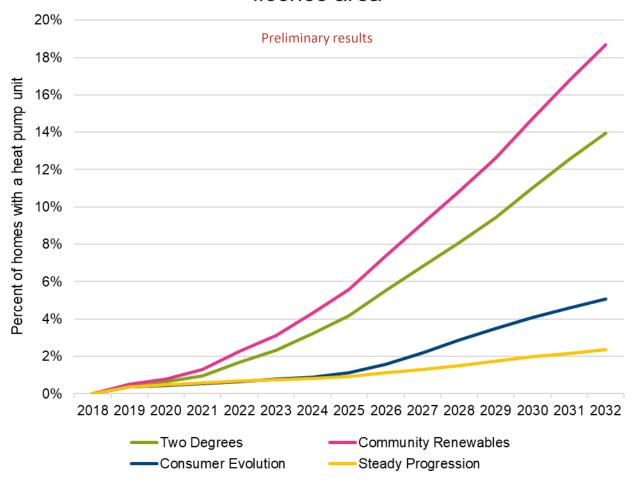
### Number of heat pumps installed per year in WPD East Midlands licence area



<sup>\*</sup> Data complete until mid 2018

#### Heat pumps: projections

# Scenario projections for percent of all homes with heat pumps in WPD East Midlands licence area



### Our spatial distribution weightings include:

- Assessment of the current baseline and distribution
- Distribution of ongas, off-gas homes
- Flats and high rise buildings
- New properties building from the new developments study

#### Sources of data

#### **Baseline includes:**

- WPD connection data
- Ordnance survey data
- Department for Transport EV statistics
- FIT data, ROC data etc.

#### **Pipeline includes:**

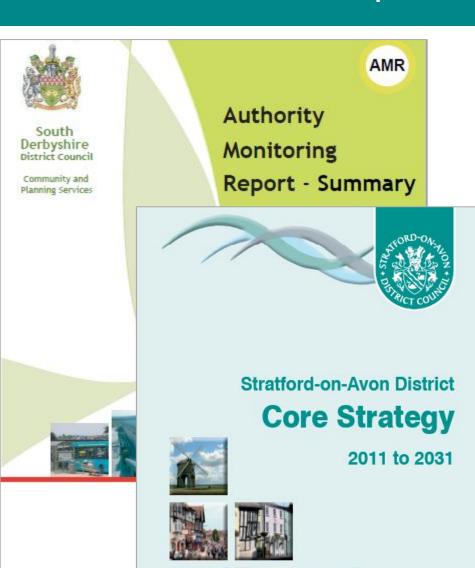
- Grid connection agreements for large scale technologies
- Projects in the planning system
- Local plans for residential and non-residential projections with data validation
- Data validation with local authorities

# NEW DEVELOPMENT STUDY POPPY MALTBY, REGEN



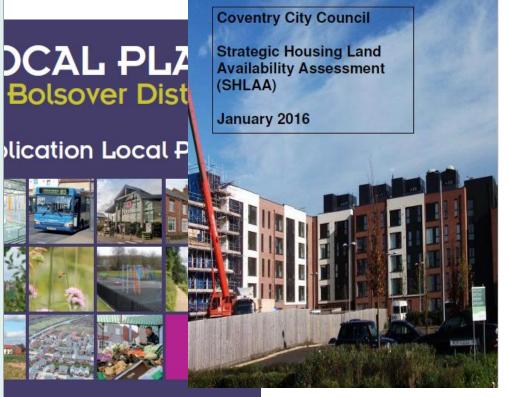
### Data – Local Development Plans





People | Place | Pro

- Local plans and core strategies
- Annual monitoring reports
- Employment and housing land availability assessments
- Housing trajectories
- Infrastructure development plans

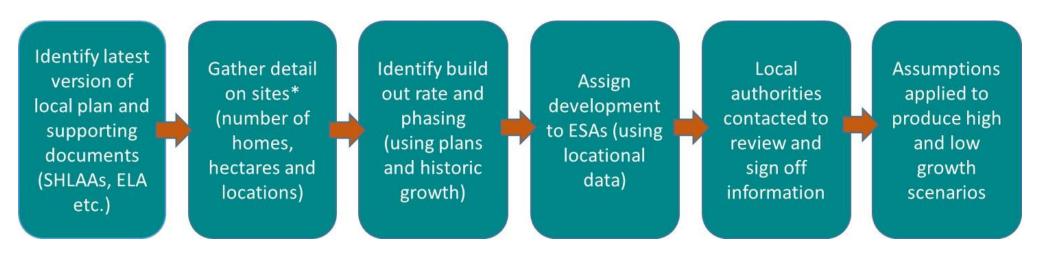


### New Developments methodology



Analysis of both domestic and new commercial developments

\* Domestic sites with 5 dwellings or over



### High and low growth scenarios



Data check:
contact all
local
authorities in
licence area
to confirm
figures

**Scenario 1**High economic growth

Apply scenario growth factors to data



- Domestic build rates adjusted to delay proportion (between 10-25%) to future years.
- 100% of strategic sites are built out and 64% of nonstrategic sites.
- Commercial developments are delayed 10-35% for high growth
- Build rates adjusted to delay a small proportion (between 25-40%) to future years.
- 100% of strategic sites are built out and 64% of non-strategic sites.
- Commercial developments are delayed 20-55% for low growth.

### Final dataset



CHECK COLUMN	SPSS 2018/19	SPSS 2019/20 ▼ 2 ▼	SPSS 2020/21 3 ▼		6PSS 6022/23	SPSS 2023/24		5PSS 2025/26	SPSS 2026/27 9 ▼	SPSS 2027/28	SPSS 2028/29	SPSS 2029/30	SPSS 2030/31 13 ▼	SPSS 2031/32 14 ▼	SPSS 2032/33 15 ▼	SPS 203:		
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				Developmen			Allocatio		tion period	Developmen					Link to	plan	plan	Pla
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		est Corby			Corby		Strategic		28		AMR	Pre-plannir	ng – available for d	levelopment	http://www.nnjp		)16	2031
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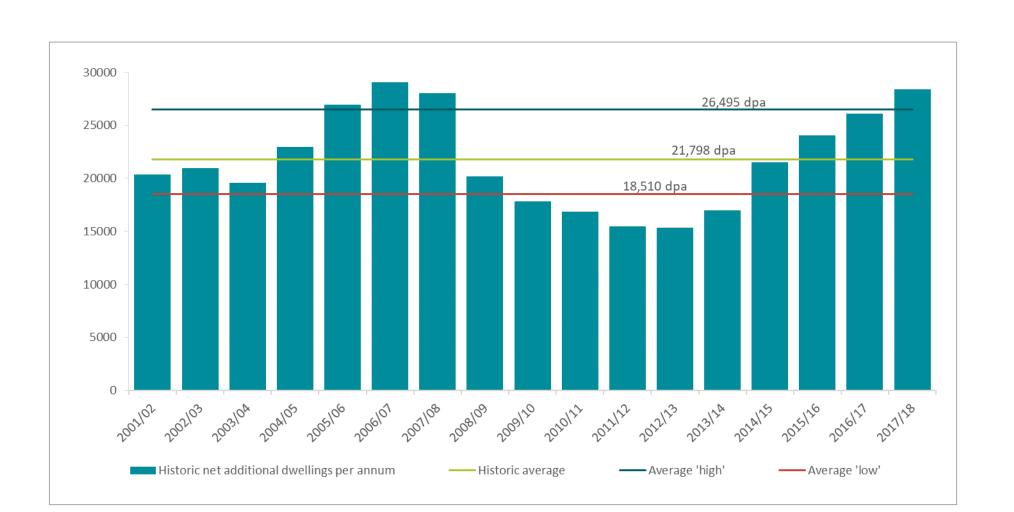
### **INITIAL FINDINGS**



### Historic dwellings per annum



High average: 26,495 Total average: 21,798 Low average: 18,510



### Domestic projections through to 2032



Draft projections to be used for network analysis.

Existing plans considerably higher than long term averages.

Reduce towards the end of the period due to planning timelines.



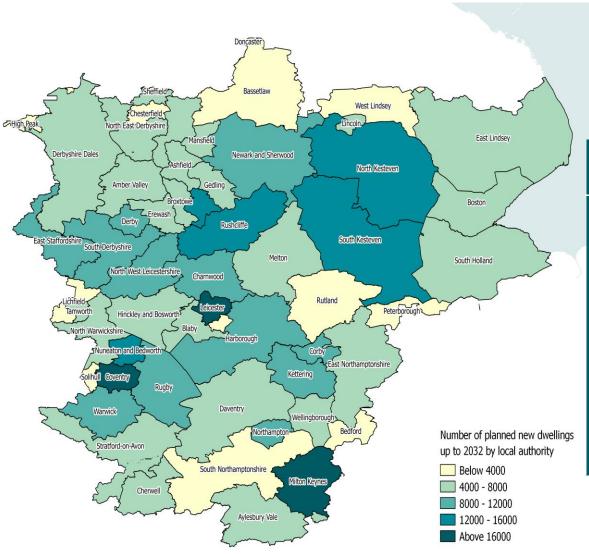
### Top 20 sites - housing



		Number of homes in projection			Published, submitted or
Development name	Local authority	period (2018-2035)	Development plan stage	Source document	adopted date
Strategic Regeneration Area	Leicester	7843		SHLAA/HELAA	01/03/2016
Western Expansion Area	Milton Keynes	5472		5-Year land supply	01/04/2018
Lubbesthorpe Application	Blaby	4150		5-Year land supply	31/03/2018
Urban area (Arnold and Carlton)	Gedling	3698	Adopted	Local plan	18/07/2018
Kettering East	Kettering	3480		AMR	01/05/2018
Priors Halls Park	Corby	3133		AMR	01/04/2017
Keresley SUE, Bablake	Coventry	3100		SHLAA/HELAA	01/01/2016
South East Coalville	North West Leicestershire	3014			01/04/2018
Wellingborough East Sustainable Urban Extension	Wellingborough	2975	Published	Local plan	20/09/2017
West Corby	Corby	2800		AMR	01/04/2017
Land south of Clifton	Rushcliffe	2750	Published	Local plan	01/05/2018
East of Gamston/North of Tollerton	Rushcliffe	2750	Published	Local plan	01/05/2018
Daventry North East	Daventry	2600	Draft	Local plan	05/10/2018
Branston Locks (Lawns Farm)	East Staffordshire	2580		5-Year land supply	19/07/2018
South East Quadrant, Canwick Heath	North Kesteven	2580		5-Year land supply	01/04/2018
Barwell SUE	Hinckley and Bosworth	2500		Residential Land Availability Monitoring Statement	01/04/2018
Rugby Radio Station	Rugby	2395	Draft	Local Plan	01/09/2016
Gayden Lighthorne Heath	Stratford-on-Avon	2300	Adopted	Core Strategy	11/07/2016
Eastern Green SUE, Baklake	Coventry	2250		SHLAA/HELAA	01/01/2016
Western Growth Corridor	Lincoln	2200		5-Year land supply	01/04/2018

### New builds – domestic

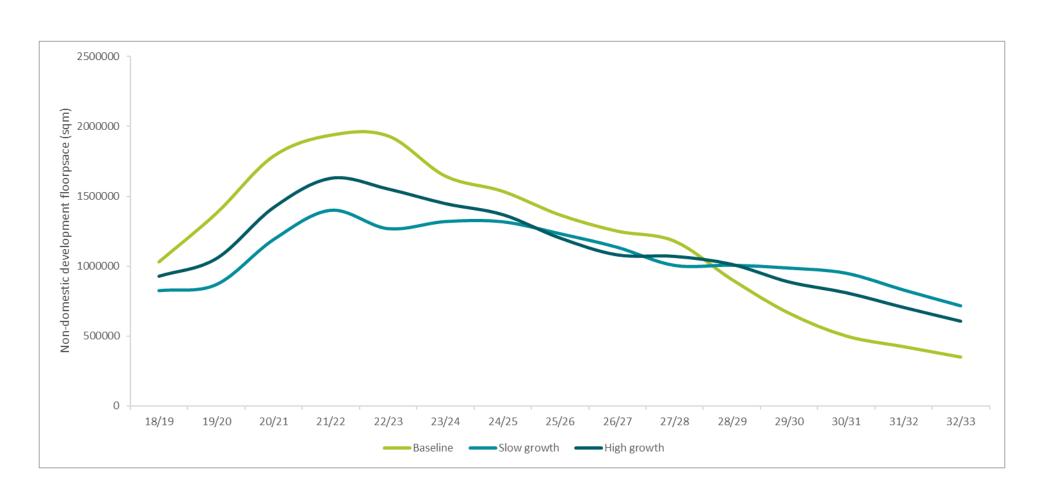




	Total homes number
Local Authority	of homes to 2035
Milton Keynes	23109
Coventry	16361
Leicester	16323
Rushcliffe	14204
North Kesteven	14079
Nottingham	13899
South Kesteven	13579
Nuneaton and Bedworth	12485
Warwick	11429
South Derbyshire	10733

### Non-domestic developments





### Top 20 sites – non-domestic

Rugby

Corby

Blaby

Derby

Kettering

Milton Keynes

North Warwickshire

Rugby Gateway

North of Birchington Road

Land west of St Johns, Enderby

Land to the south of Horiba MIRA Technology Park & Enterprise Zone

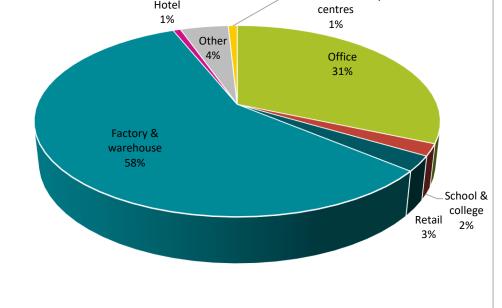
Central Milton Keynes

Derby Commercial Park

Kettering North SUE

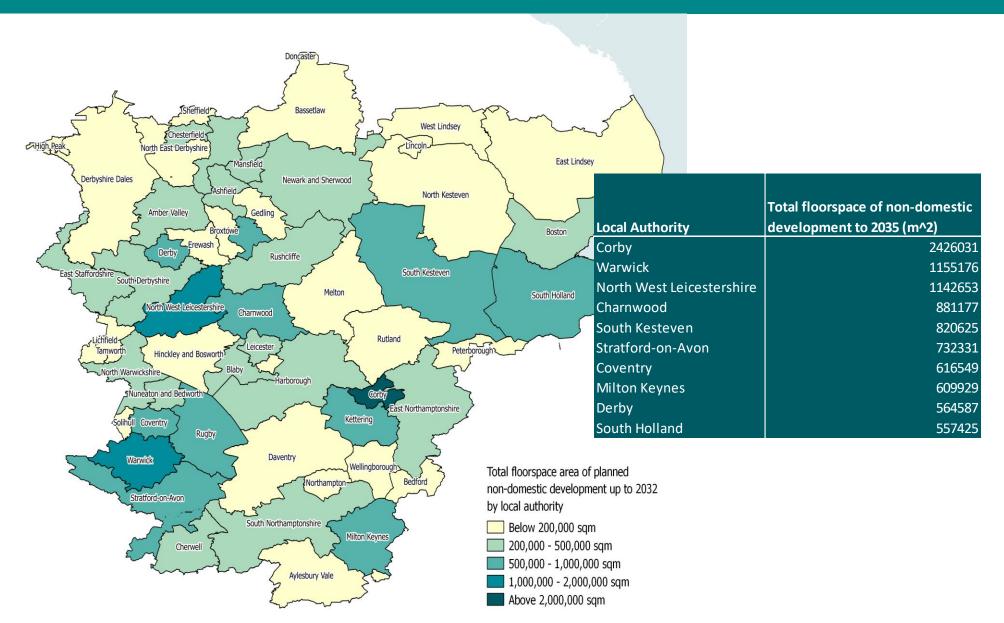


Development name	Local authority	Total site area m²	Total floorspace m <sup>2</sup>	Category	Development plan stage	Source document	Published, submitted or adopted date
Land at Geddington Road, Corby	Corby	1437000	756316	Factory and Warehouse	Published	ELR	20/05/2018
Strategic Rail Freight Interchange	North West Leicestershire	600000	557414	Factory and Warehouse			
Banbury Road, Gaydon	Stratford-on-Avon	1000000	526316	Factory and Warehouse		Other	30/11/2012
Land in vicinity of Coventry Airport	Warwick	1000000	526316	Factory and Warehouse	Adopted	Local plan	2017
Land in vicinity of Coventry Airport	Warwick	1000000	454545	Office	Adopted	Local plan	2017
Midlands Logistics Park (formerly Stanion Lane Plantation)	Corby	953000	381200	Other	Published	ELR	20/05/2018
Land South of Newark	Newark and Sherwood	500000	263158	Factory and Warehouse	Published	Core Strategy	01/07/2017
Barn Close	Corby	420000	221053	Factory and Warehouse	Published	ELR	20/05/2018
Loughborough	Charnwood		216545	Office		SHLAA/HELAA	30/07/2018
Central Milton Keynes  Land South of Milton Keynes	Milton Keynes Milton Keynes			Hotel 1%	cer	community ntres L%	
Kettering South SUE	Kettering			Other		-70	
South West Rugby	Rugby			4%		Office	
Land South of Wilmore Road	Derby					31%	



### New builds – non-domestic





### **BREAK**



### Roundtable sessions



- 1. Electric Vehicles projections and growth in East Midlands
- 2. Generation onshore wind, large solar PV and energy from waste
- **3. WPD Flexible Power** Distribution System Operator and what it means for customers.
- c. 30 min discussions
- 2 out of 3 sessions
- Short feedback at the end

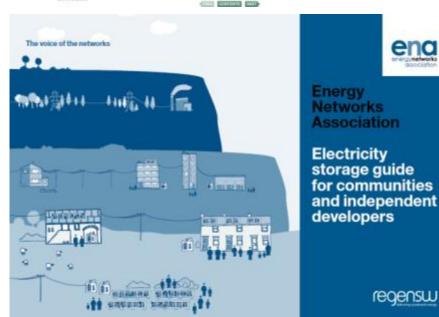
### **FEEDBACK**











The Voice of the Networks



Energy Networks Association

Distributed Generation
Connection Guide

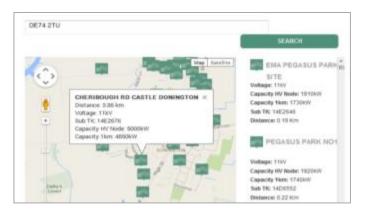
A GUIDE FOR CONNECTING GENERATION TO THE DISTRIBUTION NETWORK THAT FALLS UNDER G59/3 AND IS 50KW OR LESS 3-PHASE OR 17KW OR LESS SINGLE-PHASE

June 2014



#### **Providing Greater Network Visibility**

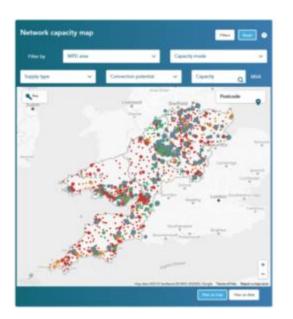
- WPD Web Map linesearchbeforeyoudig.co.uk
- EHV Constraints Map
- Estimated Capacity Tool
- Connection Surgeries

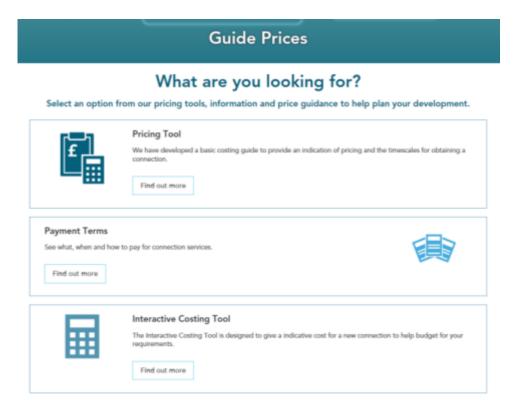




#### **Providing Greater Network Visibility**

- Network Capacity map
- Costing tool
- Apply online

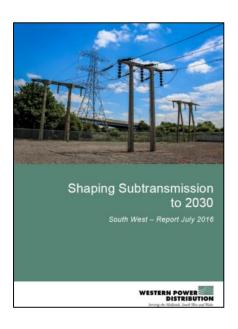


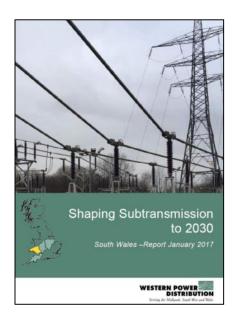


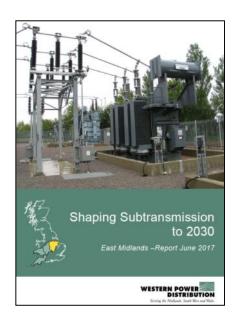


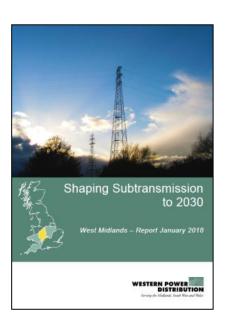


Every 6 months we publish a strategic investment study report on one of our four licence areas.











#### **FURTHER COLLABORATION**

All our reports, webinars and presentations are published online at: <a href="http://www.westernpower.co.uk/netstrat">http://www.westernpower.co.uk/netstrat</a>

If you have any questions in relation to WPD's Network Strategy work, please contact WPD on the details below:

Email: wpdnetworkstrategy@westernpower.co.uk

#### By post:

Network Strategy Team Western Power Distribution Feeder Road Bristol BS2 0TB



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