

## NORTHERN IRELAND ENERGY INDUSTRY - GENERAL BACKGROUND

1. Northern Ireland has c.783,000 domestic and c.62,000 non-domestic electricity customers. The domestic sector represents more than 90% of total customers with domestic consumption around 40% of total Northern Ireland electricity consumption. Power NI is dominant provider with c.79% share of the market.
2. Phoenix Natural Gas has approximately 160,000 customers and *firmus energy* around 20,000 natural gas customers. Phoenix Natural Gas has approximately 160,000 connected consumers in Greater Belfast and *firmus energy* around 20,000 natural gas connections in their "10 Towns" licensed area. The domestic and small I&C gas sectors represent around 98% of connections in the Greater Belfast area and around 45% by gas usage.
3. There are three conventional power stations in Northern Ireland. Dispatchable generation, as described in the SONI Generation Capacity Statement (January 2013), is as follows:

Ballylumford (owned and operated by AES Ltd) consisting of:

- 1097 MW - (gas fired); and
- 116 MW - (gas oil fired)

Kilroot (owned and operated by AES Ltd) consisting of:

- 476 MW - (dual coal or heavy fuel oil fired ); and
- 142 MW - (gas oil fired)

Coolkeeragh (owned and operated by ESB International Ltd) consisting of:

- 402 MW - (gas-fired Combined Cycle Gas Turbine (CCGT)); and
- 53 MW - (gas oil fired)

4. Other generation includes:
  - 9 MW - combined heat and power (CHP)
  - 250 MW - Moyle electricity interconnector with GB (see 6. below)
  - 47 MW - Aggregated Generation (distillate oil)
  - 581 MW - renewable energy sources.
5. Northern Ireland has a forecast total installed dispatchable generation capacity of 2592 MW (including Moyle but excluding renewables). Forecast peak electricity demand for 2013/14 is c.1780 MW. Indigenous renewables account for around 15% of electricity consumption in Northern Ireland, with average wind contribution at peak demand of 146 MW.

6. The Moyle electricity interconnector, owned by Mutual Energy (a mutual / "not for dividend" company), links Northern Ireland with Scotland and has a capacity of 450 MW (though currently restricted to 250 MW due to cable faults).
7. The current North-South electricity interconnector has a capacity of 600 MW. However, net transfer capacity is limited to 300 MW, North to South, mainly because of transmission constraints in RoI. It is planned to build a second North-South interconnector which it is anticipated should be in place by 2017/18, which will more than double trading capacity.
8. The Scotland to Northern Ireland gas pipeline (SNIP) supplies natural gas to Northern Ireland for power generation and to around 180,000 business and domestic gas customers. The SNIP is owned by Mutual Energy, who also own the Belfast Gas Transmission Pipeline (BGTL) which crosses Belfast Lough and was acquired from Phoenix Natural Gas.
9. Northern Ireland has gas interconnection with RoI through the South-North gas pipeline which is owned and operated by the Irish semi-state gas company Bord Gas Eireann (BGE).