

Aggregate Industries

Demand side response overview 2019

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Energyst DSR Event – “Unlocking value in a shifting landscape”

September 2019

Snapshot

- 2019 has been a *year of change* for our DSR offerings
- All 3 of our DSR programmes have changed

Previously...

FFR, 42 asphalt plants, 4MW

FCDM, cement plant, 5.7MW

CM (NI), cement plant, 4.7MW



This year...

Flex software trial, roll-out(?)

Low frequency static FFR

CM + DS3 (new market)

Navigating the changing DSR landscape

Issues and barriers we've faced recently...

- FFR – Suppressed FFR prices at a time of capex investment

IMPACT: Decision to be made on extent / timing of roll-out

- FCDM/FAFR – uncertainty around the start of the FAFR auctioning = confusion around when our FCDM contract would end
- FAFR – different programme parameters meant that, during testing, the plant did not meet new requirements => switch to Low Frequency Static FFR

IMPACT: Three month gap in service provision, new hardware installation

End user confidence

- For all 3 programme changes, we've had to go to market
- Comparing proposals has been very difficult, time consuming (and frustrating)
- Flex Assure scheme from the ADE, voluntary code of conduct for DSR service providers



- National Grid ESO's Power Responsive programme

Moving forward

- FFR roll-out in our asphalt business

What will happen to FFR prices in light of recent network issues?

- Get 'comfortable' with new service provision in our cement business
- DNO and energy supplier flexibility schemes – having the right assets, in the right places, able to respond in time

In summary

It's been a year of change, but changes we asked NG for in simplifying and opening up access to DSR programmes. For end users, the picture looks ever more complex and granular. Reliance on a trusted aggregator is more important than ever.

Thank you for your attention...

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