

BWEA



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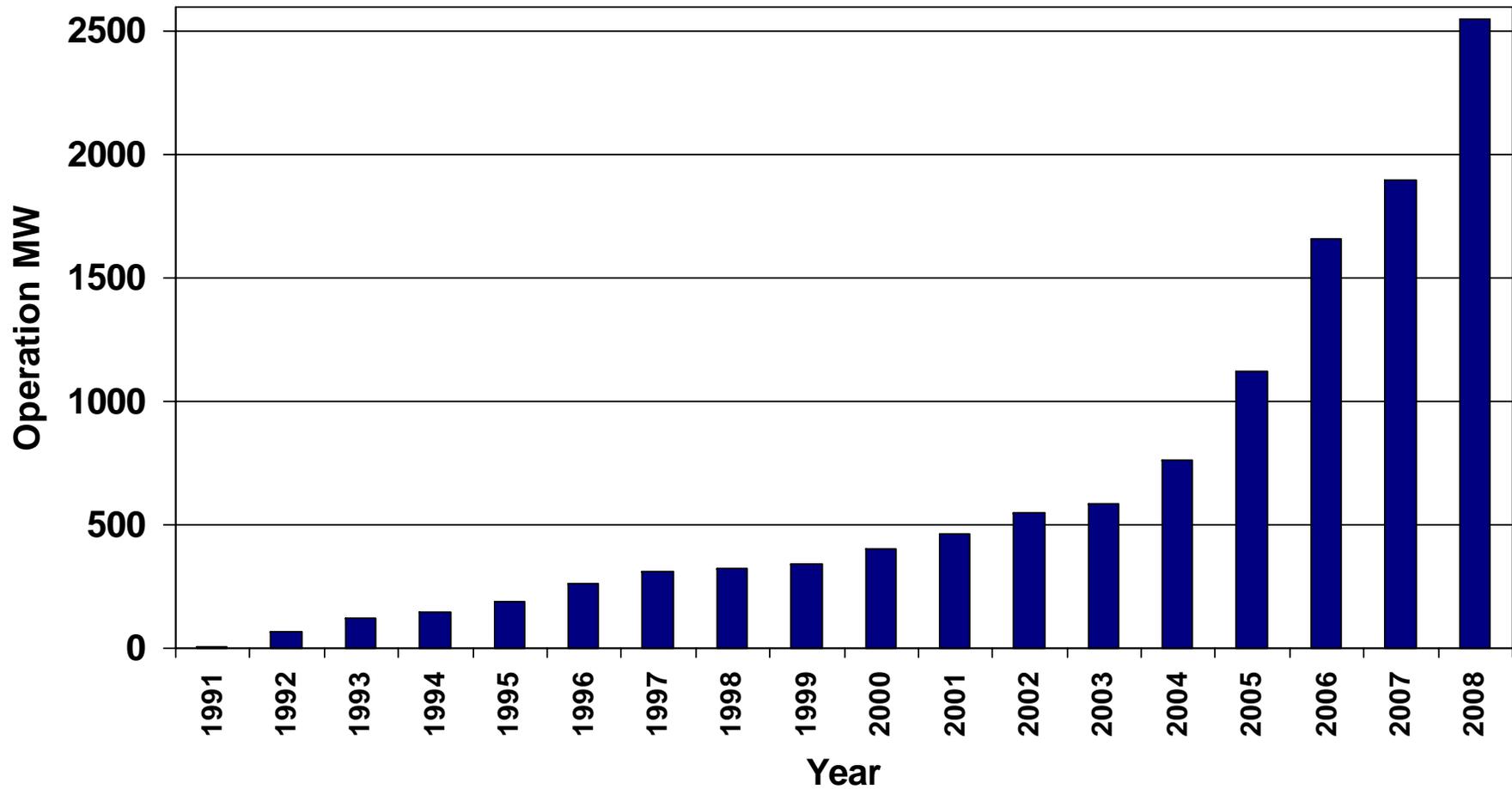
Representing the wind, wave
and tidal sectors

Powering Ahead

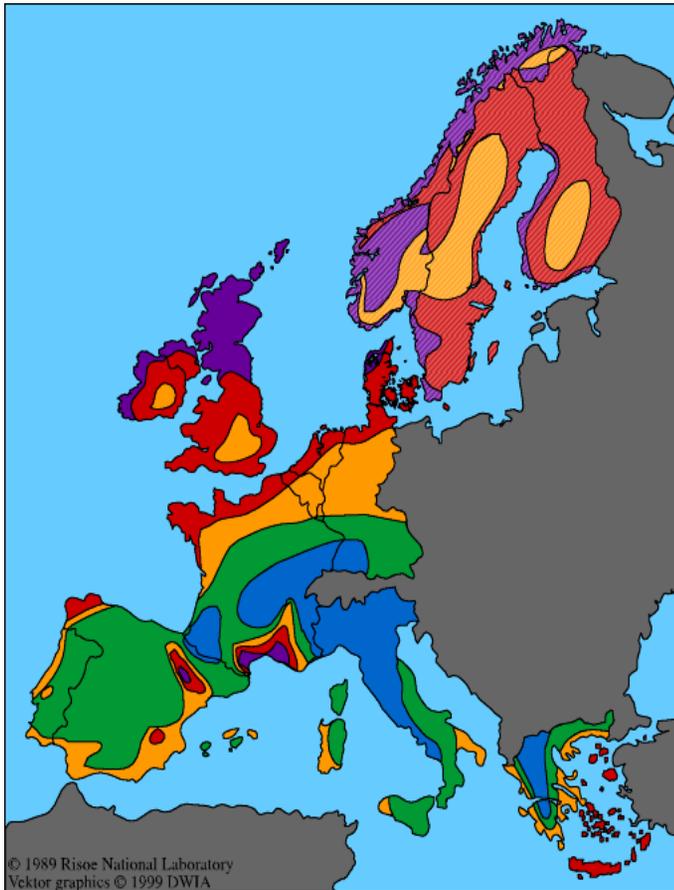
About BWEA

- BWEA represents the wind, wave & tidal sectors in the UK
- Over 500 corporate members, large & small from all sectors
- 25 members of staff based in Victoria, London

Market Growth (Onshore)



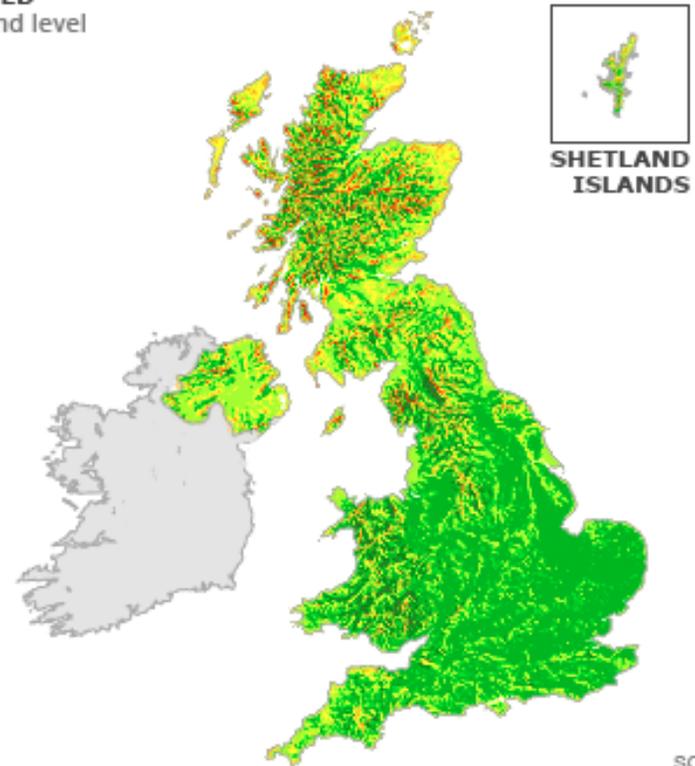
Wind Resource



m/s	W/m ²	m/s	W/m ²						
>6.0	>250	>7.5	>500	>8.5	>700	>9.0	>800	>11.5	>1800
5.0-6.0	150-250	6.5-7.5	300-500	7.0-8.5	400-700	8.0-9.0	600-800	10.0-11.5	1200-1800
4.5-5.0	100-150	5.5-6.5	200-300	6.0-7.0	250-400	7.0-8.0	400-600	8.5-10.0	700-1200
3.5-4.5	50-100	4.5-5.5	100-200	5.0-6.0	150-250	5.5-7.0	200-400	7.0-8.5	400-700
<3.5	<50	<4.5	<100	<5.0	<150	<5.5	<200	<7.0	<400
			>7.5						
			5.5-7.5						
			<5.5						

AVERAGE WIND SPEED
25 metres above ground level
m/s

- > 10
- 9 - 10
- 8 - 9
- 7 - 8
- 6 - 7
- 5 - 6
- < 5



Market Drivers

- Economic Driver
- Environmental Driver
- Social Driver

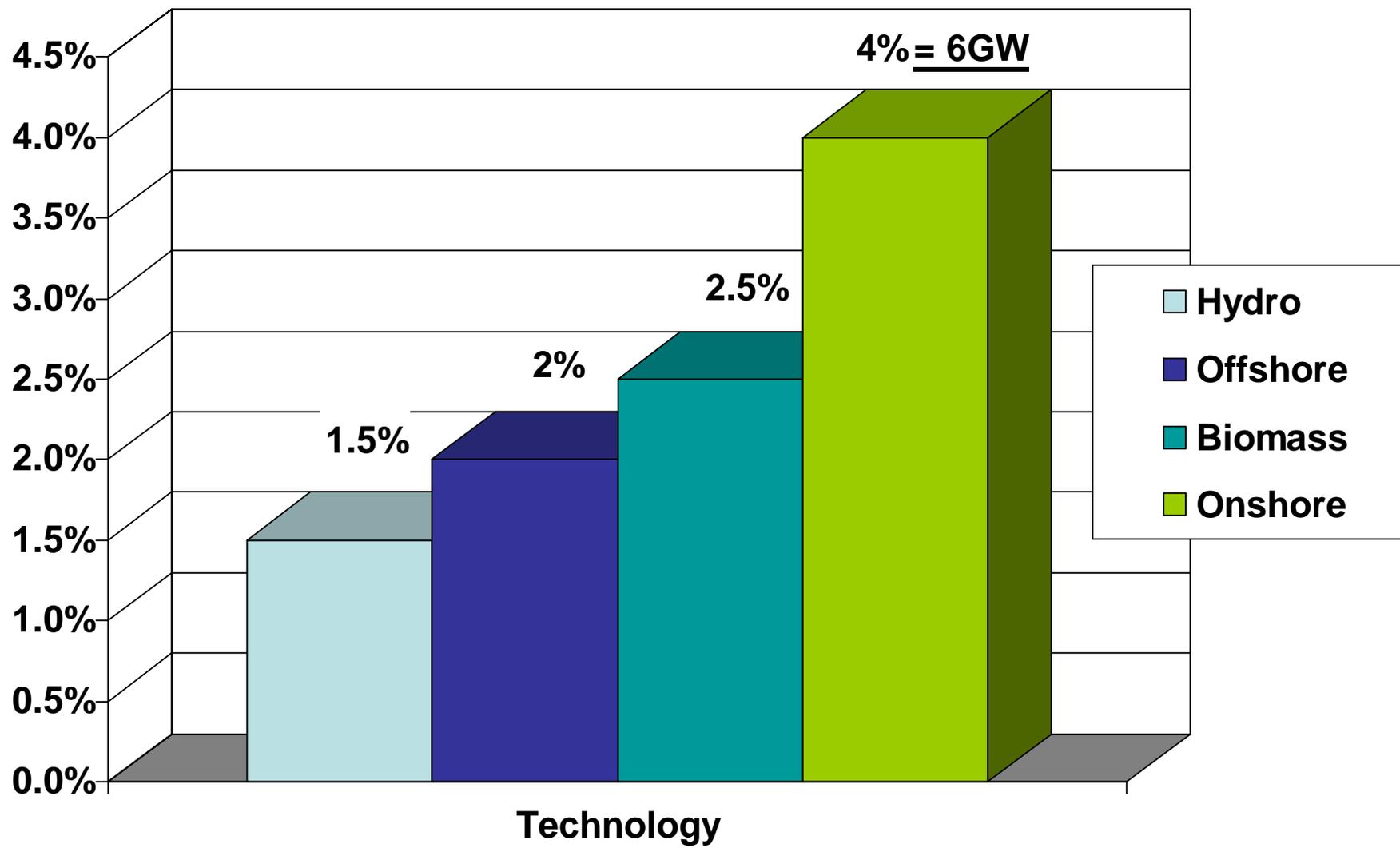
About the sector

- 217 windfarms
- 2,537 turbines
- 3,647 MW operational (3081 MW onshore / 566 MW offshore)
- *2688 MW under construction*
- *6443 MW consented*
- *9771 MW in planning system*
- 2,039,211 homes
- 4,121,245 CO2 emission reductions

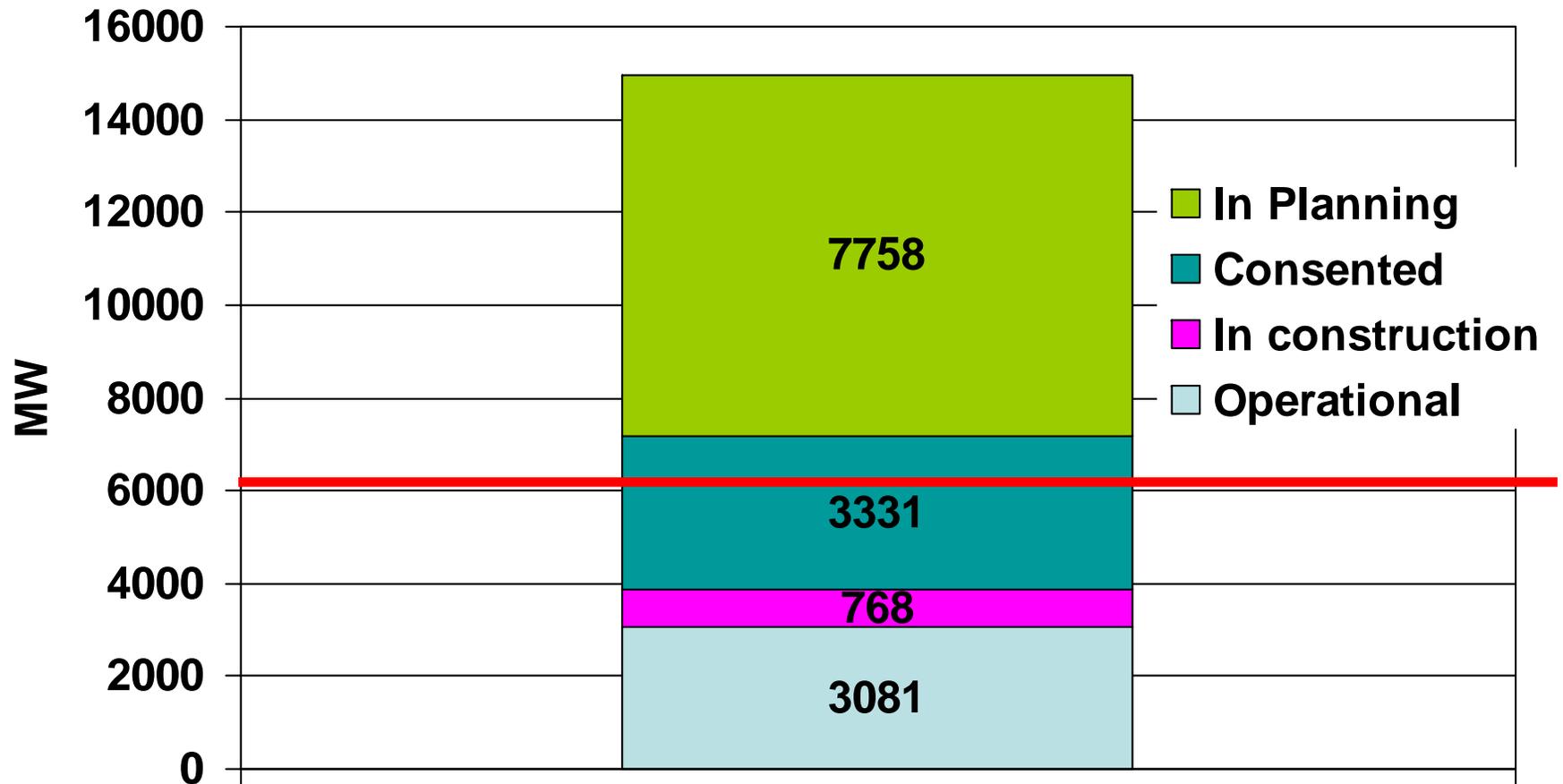
Aims for the Future

- 2010 – 10% of electricity from renewables
- 2020 - 15% all energy from renewables
 - Requires 35% of electricity by 2020

Technologies to deliver 10%



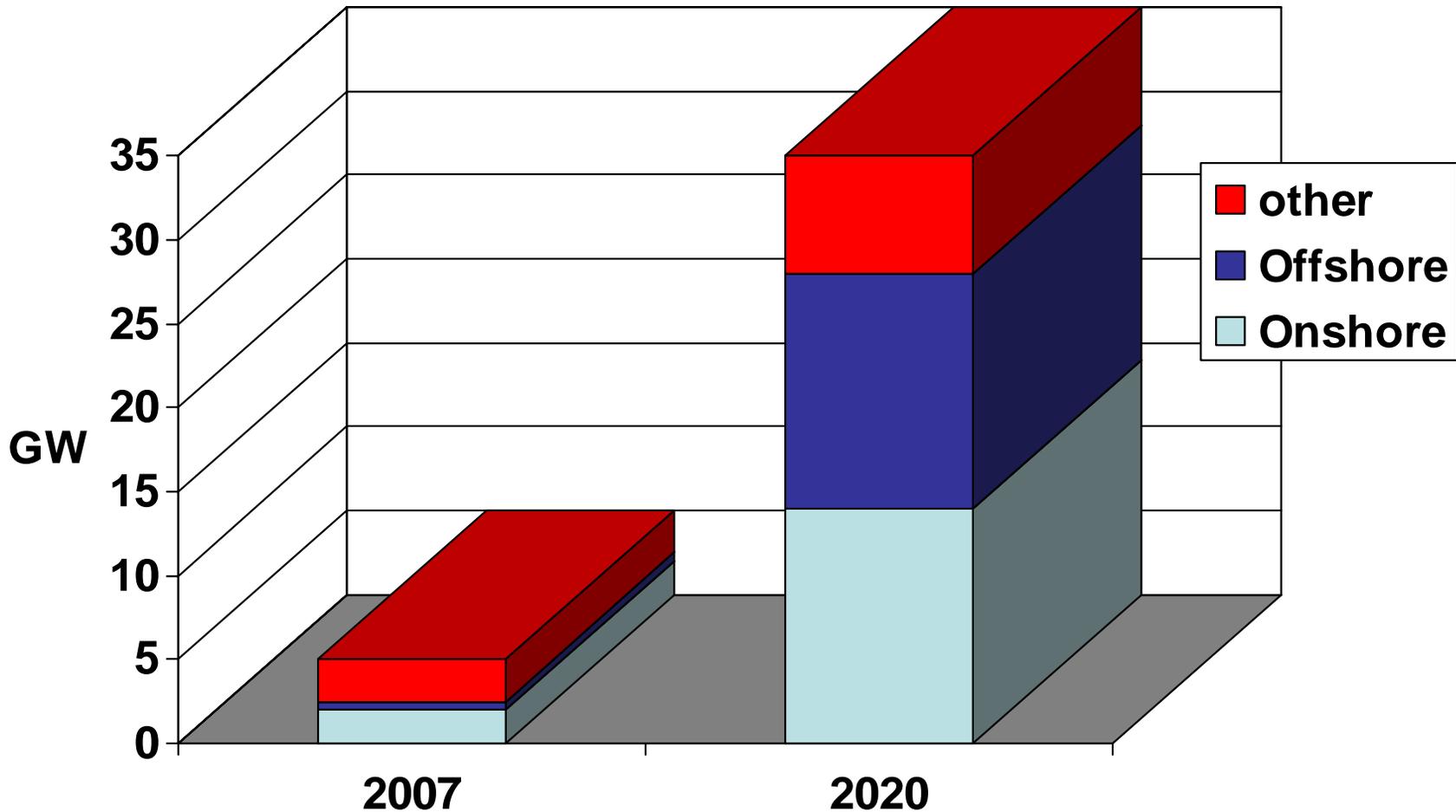
Onshore Wind - Progress 6GW



2020: A challenge on a different scale

- 15% of all energy from renewables (EU target)
- Renewable heat & transport starting at low base
- 35 - 40% renewable electricity by 2020
- Wind energy needs to deliver the lions share

2020: Breakdown of renewable electricity generation capacity



The problem for wind schemes

- 6% of wind schemes decided within 16 weeks – 70% of other major apps
- Average application takes 14 months at LPA – 26 months at Appeal
- 55% approval rate by Local Authorities
- 40% of cases decided at appeal – with 45% success rate

There is a real tension between nationally or regionally set priorities and locally taken decision making.

Economic opportunities for UK

- £60 billion of private investment
- 60,000 UK jobs in manufacturing, operations & maintenance
- Modern turbine 3MW puts £100,000 into local economy every year through maintenance, community payments, rates and rents.

Delivering a wind revolution

Onshore

- Keep the IPC & National Policy Statements
- Ring fence business rates for local authorities
- Strengthen NPS status
- Additional LPA resources & training
- Best practice by developers and improved engagement

Delivering a wind revolution

Offshore

- Speed up lengthy, uncertain & bureaucratic approvals process
- Transfer staff & responsibility for all offshore applications to IPC
- Using the SEA process to establish clearer marine planning framework

Delivering a wind revolution

Improving Grid Access

- Ofgem to allow National Grid to use assets to fund new access & connection networks
- National Grid to adopt 'predict & provide' investment strategy
- Guarantee connection and deeper reinforcement planning are heard by new IPC



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