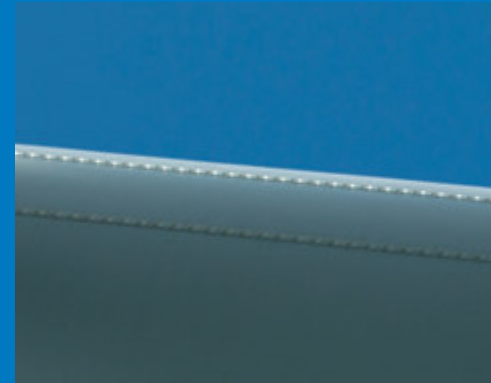
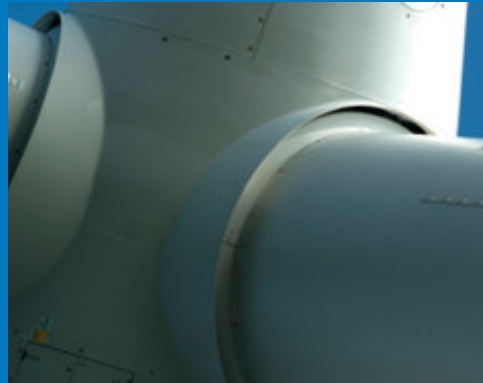


Signposts to 2020



Gary Dolphin
Market Outlook Manager
Energy Strategy and Policy

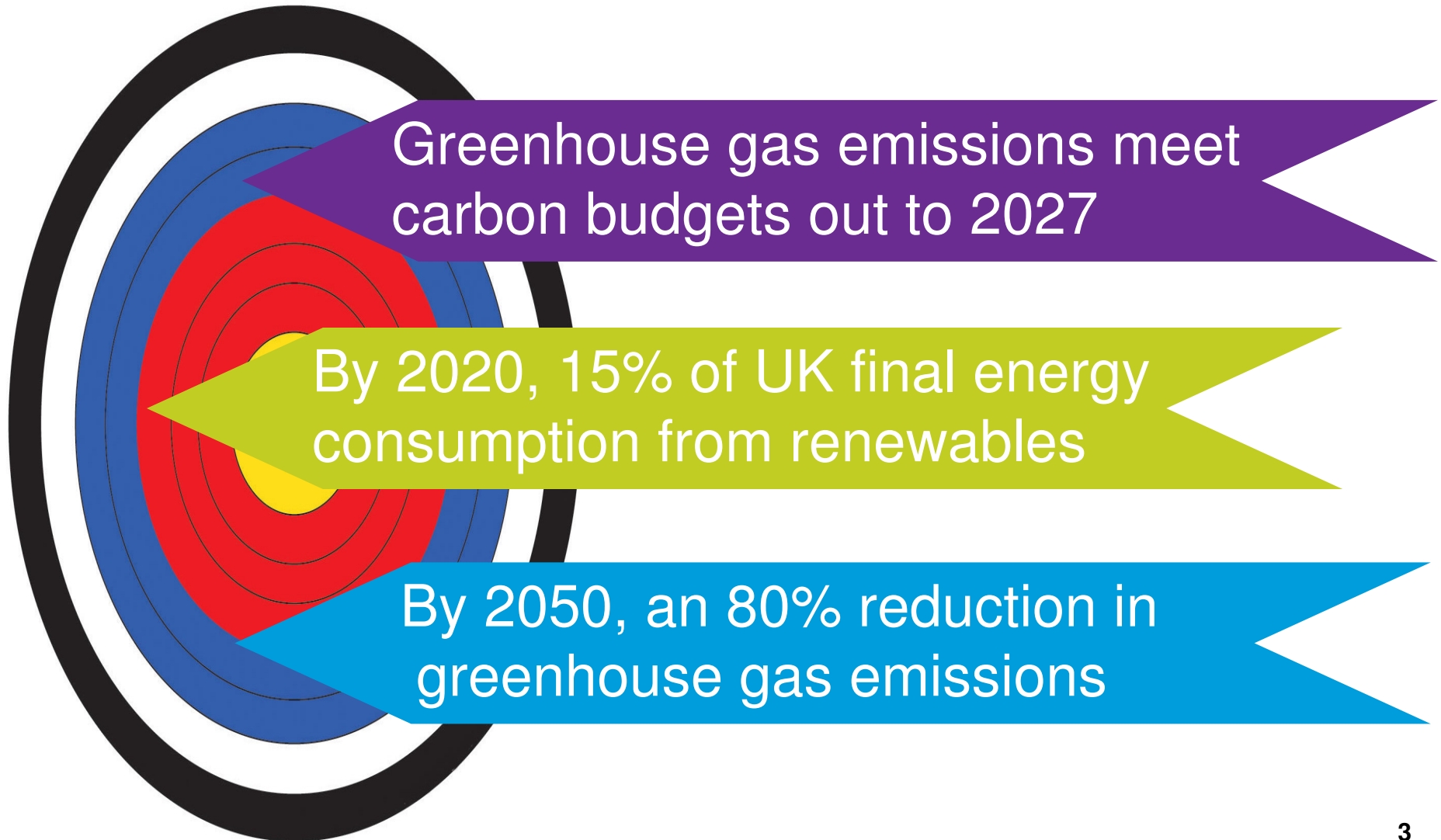
Agenda

The environmental targets

Gone Green: what needs to happen?

How are we doing?

Environmental Targets



Greenhouse gas emissions meet carbon budgets out to 2027

By 2020, 15% of UK final energy consumption from renewables

By 2050, an 80% reduction in greenhouse gas emissions

15%

Renewable energy as % of energy consumption

2007: 1.8%

2008: 2.4%

2009: 3.0%

2010: 3.2%

2011: 3.8%

2012: 4.1%

15%

8%

EU Renewable Energy Progress

Member State	1 st Interim target (%)	2020 Renewable Energy Share (%)
Belgium	4.4	13
Germany	8.2	18
Denmark	19.6	30
Spain	10.9	20
France	12.8	23
Ireland	5.7	16
Netherlands	4.7	14
UK	4.0	15
EU	10.7	20

Our stakeholder engagement

“When will the UK achieve 15% of its energy requirements from renewable sources?”

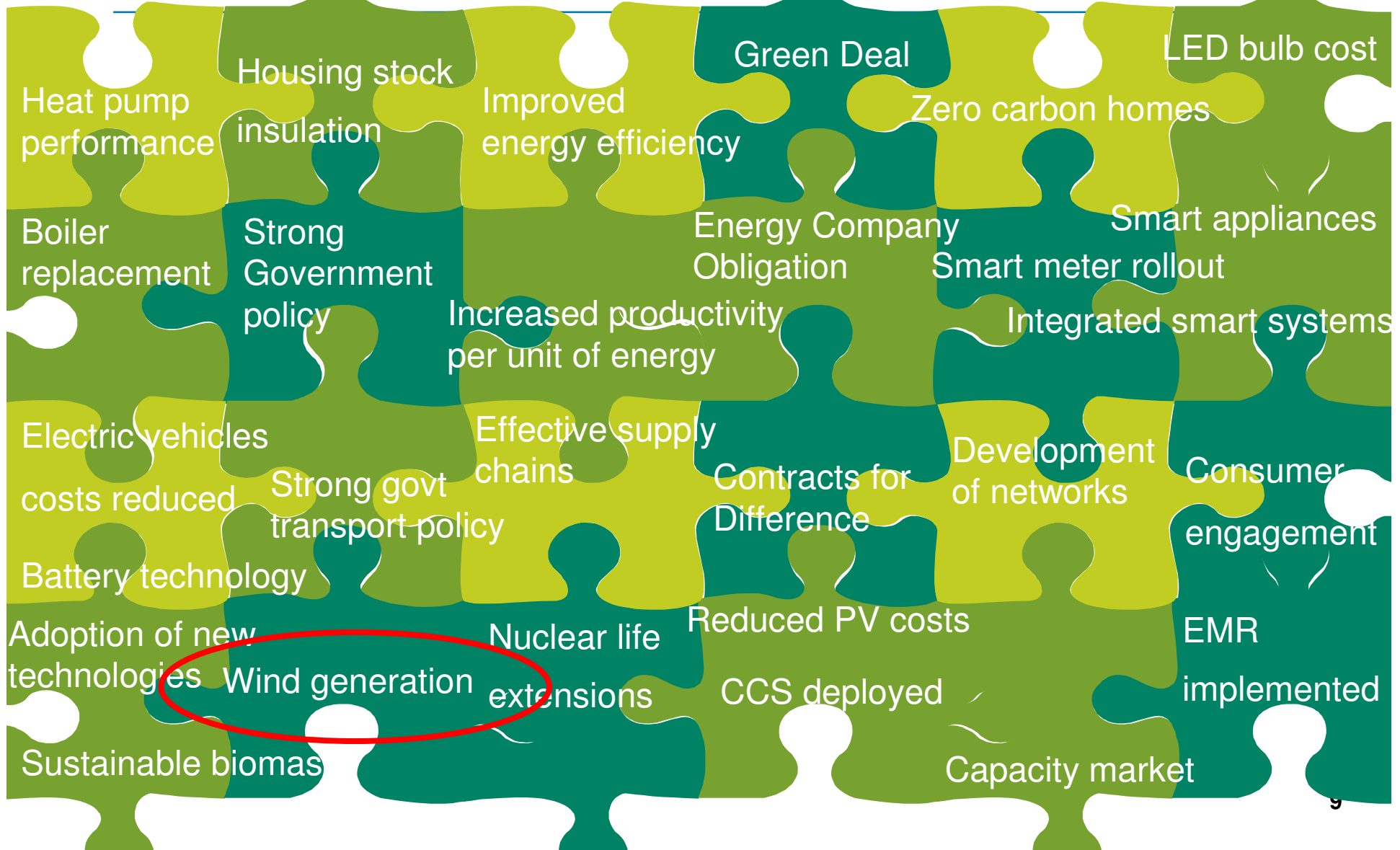


London Array Ltd

Gone Green: meeting the targets on time is...

“Challenging but achievable”

Gone Green: what needs to happen?



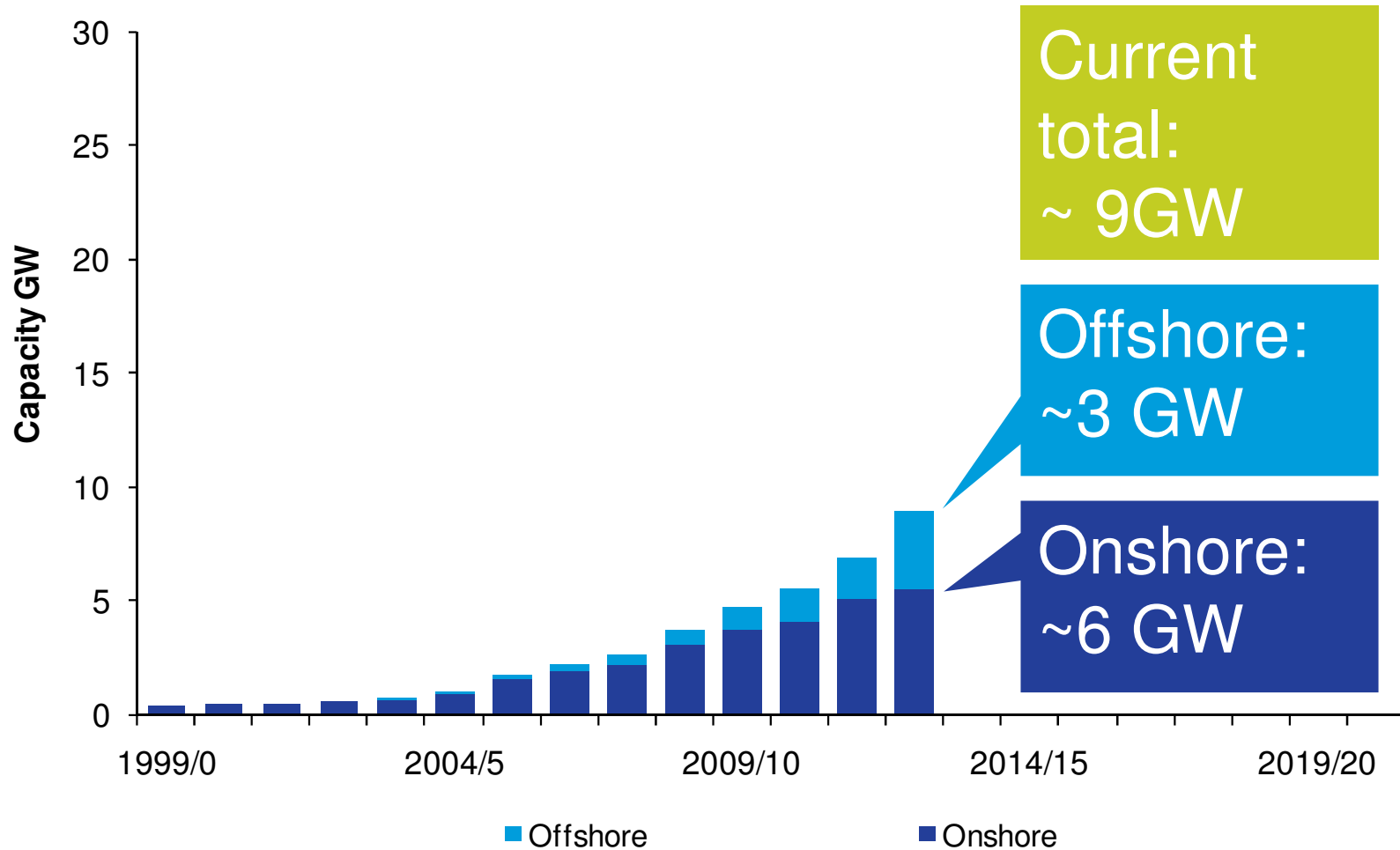
Gone Green

In Gone Green, by 2020, 34% of power generation is from renewable energy

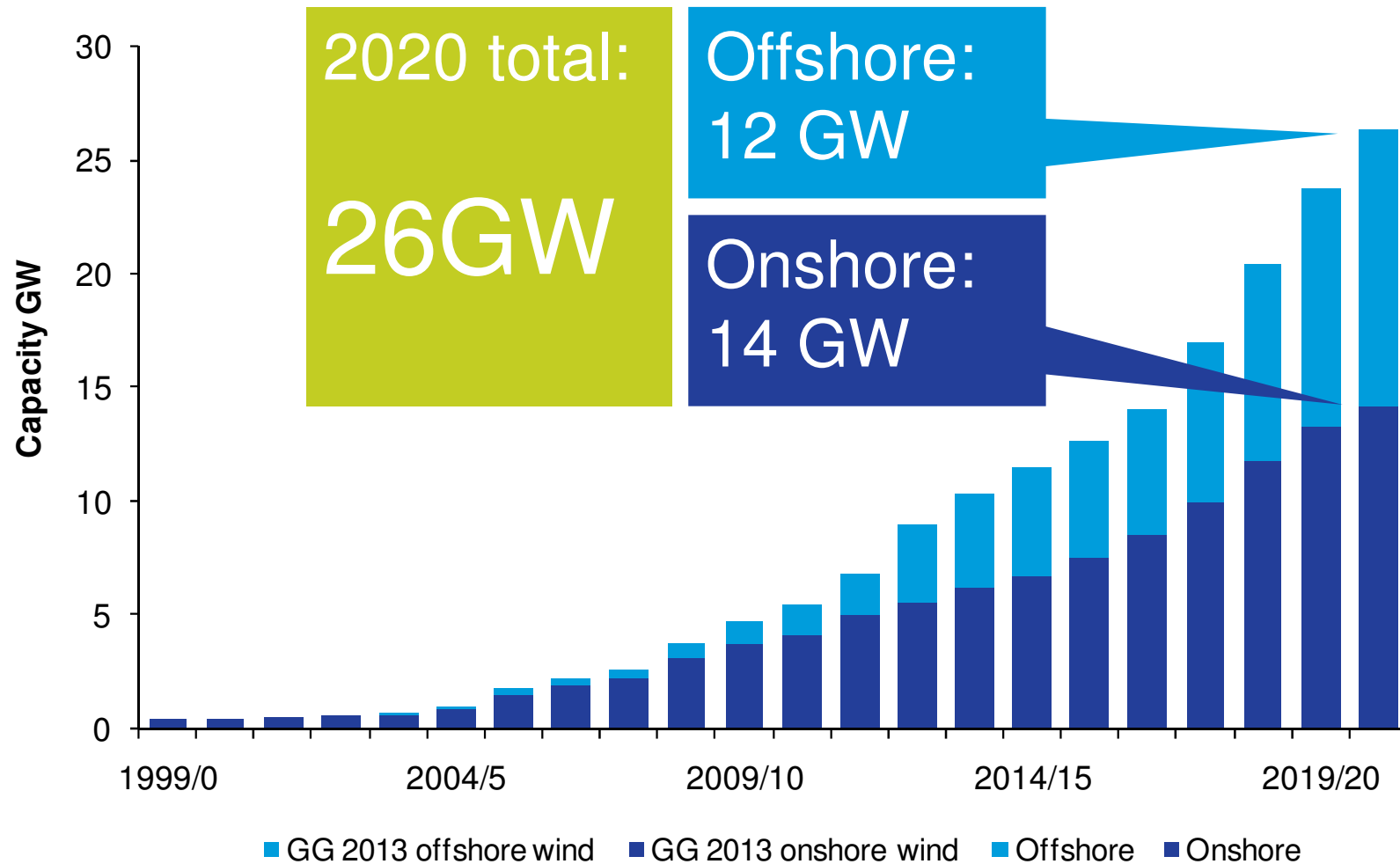
The biggest contribution is from wind



Wind capacity



Gone Green: wind capacity



Additional wind capacity requirement

2020: additional 9 GW offshore

2020: additional 8 GW onshore

Total new renewable generation contracted to connect to Transmission system by 2020:

49 GW

Total:
17 GW



London Array Ltd



Scoping

38 GW

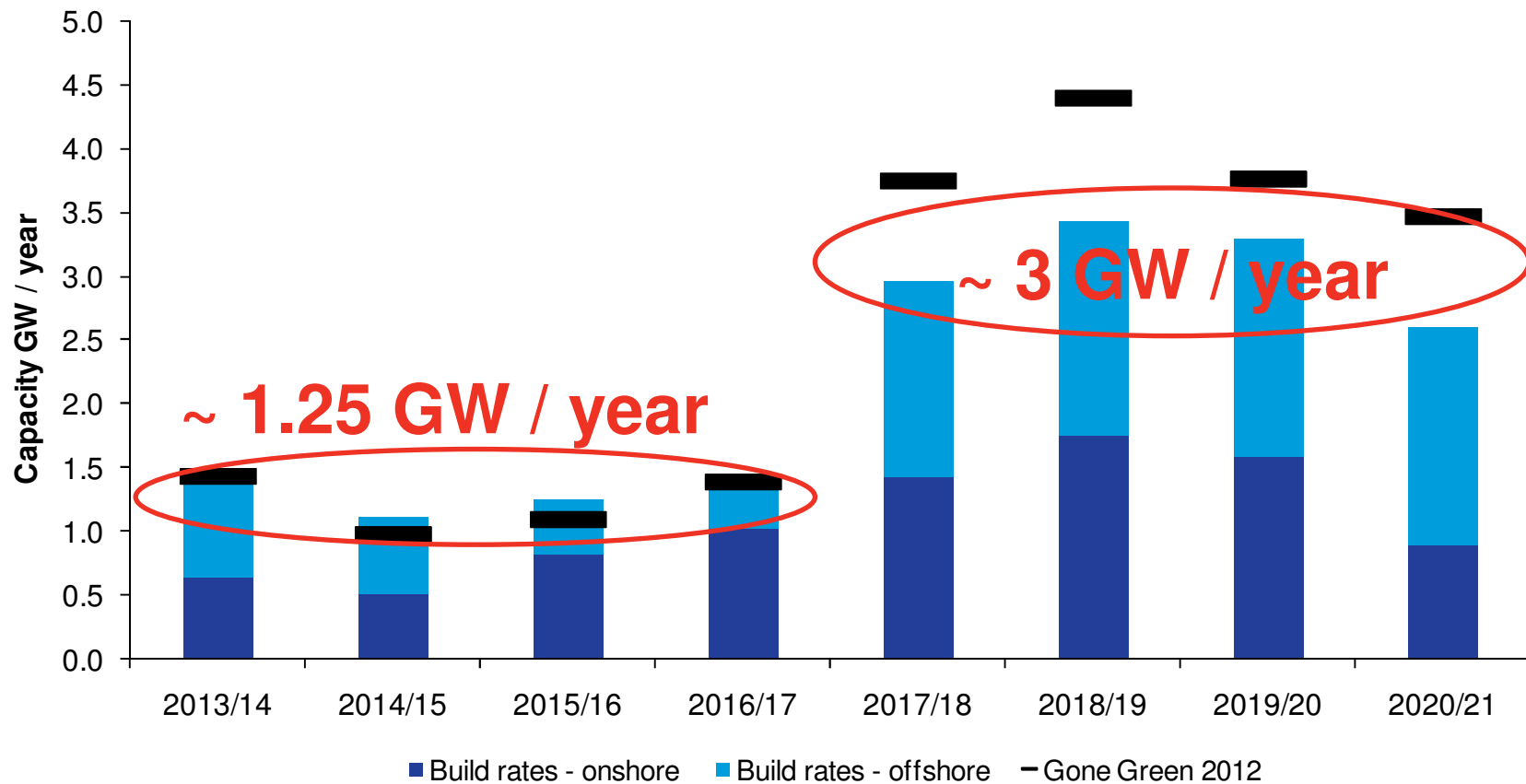
Awaiting consents

7 GW

3 GW Consents approved

1 GW Under construction / commissioning

Gone Green 2013 build rates: GW per year



Recent build rates?

In 2011: Total capacity installed in UK: 1.3 GW

In 2012: Total capacity installed in UK: 1.9 GW

Offshore wind capacity installed: 0.9 GW

234 turbines connected offshore

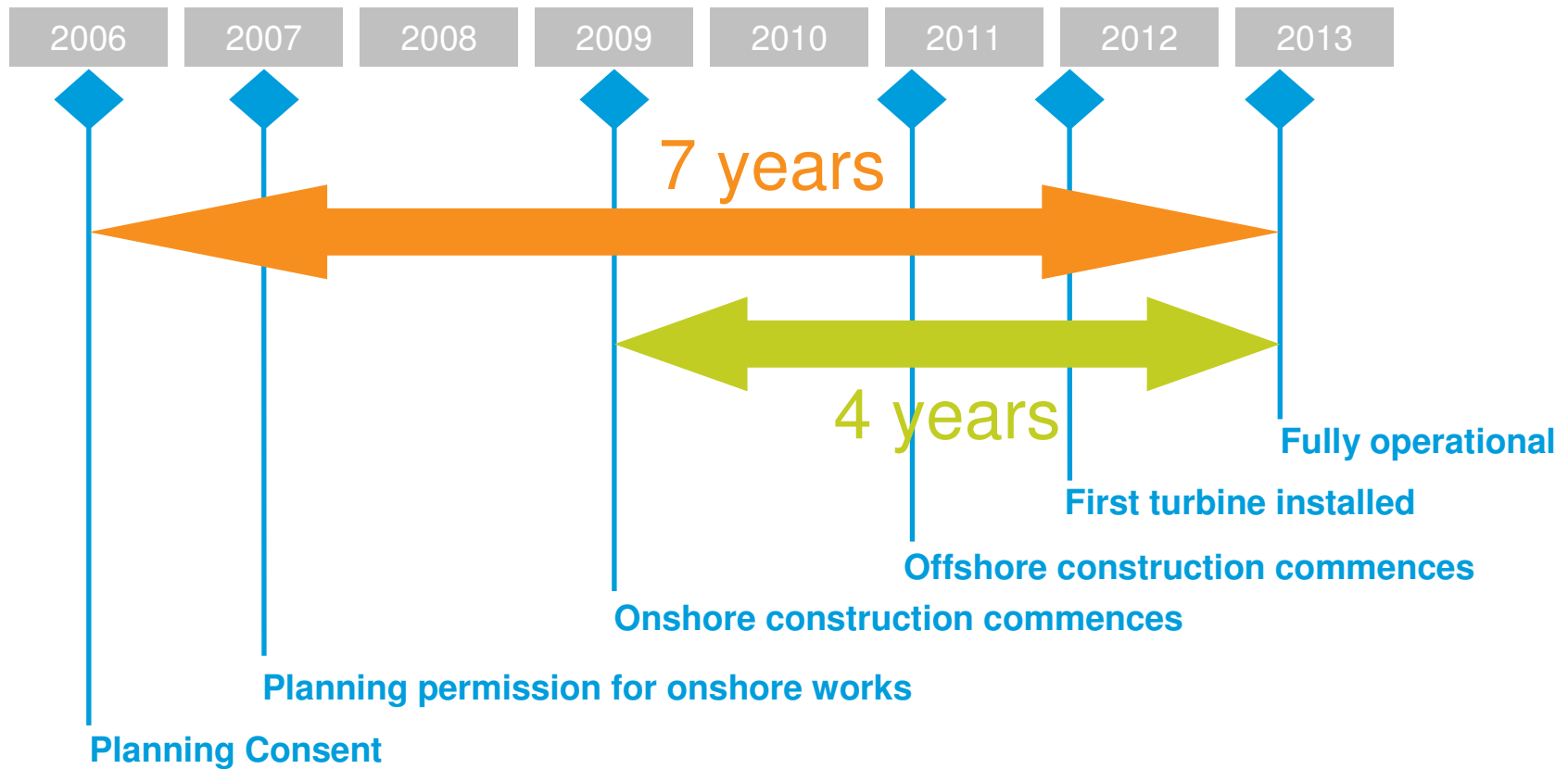
From 2017: Gone Green requires ~ 300 5MW turbines per year to be connected offshore until 2020

Now to 2020: 9GW offshore = 14 additional London Array Phase 1

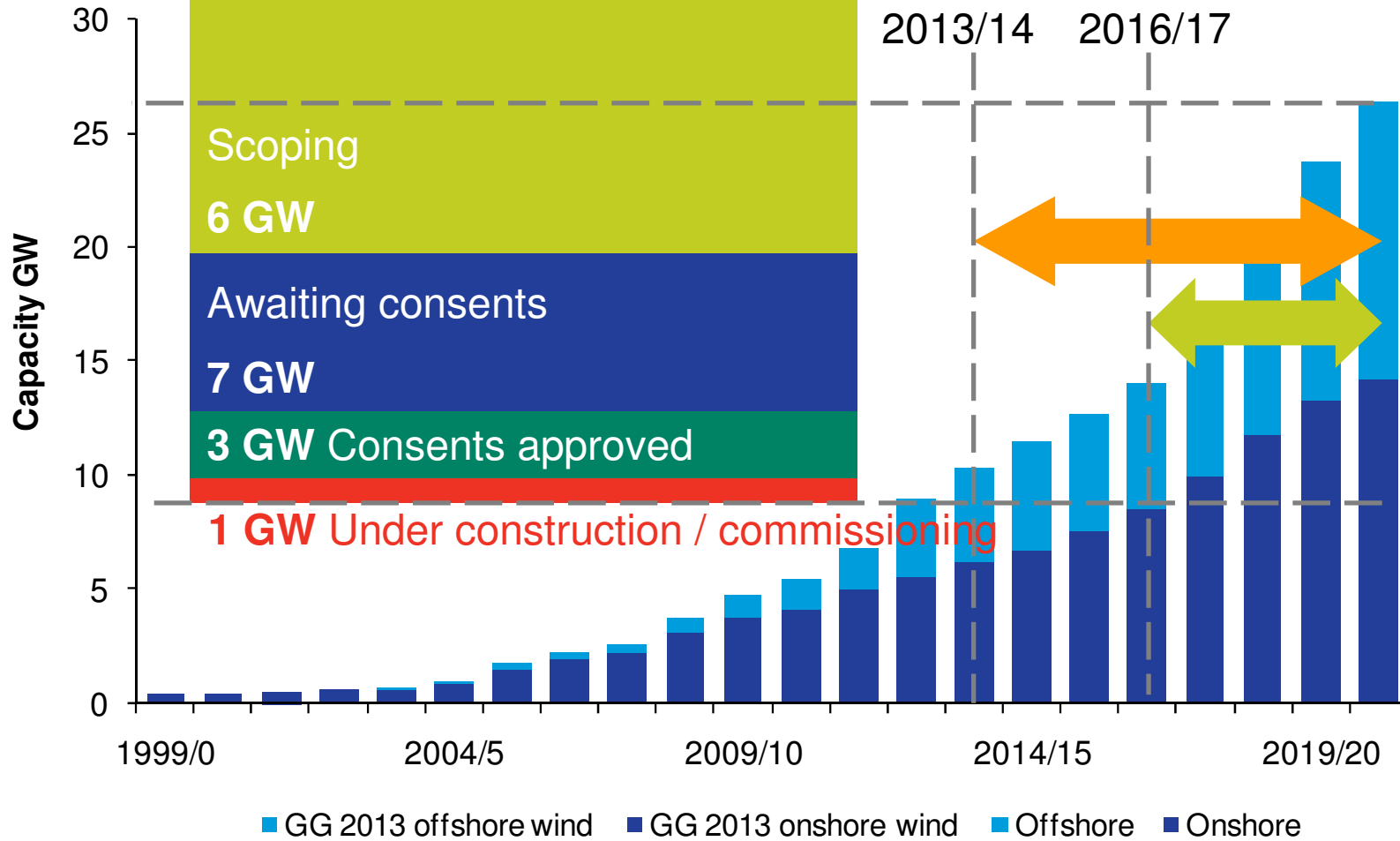
David Cameron



London Array



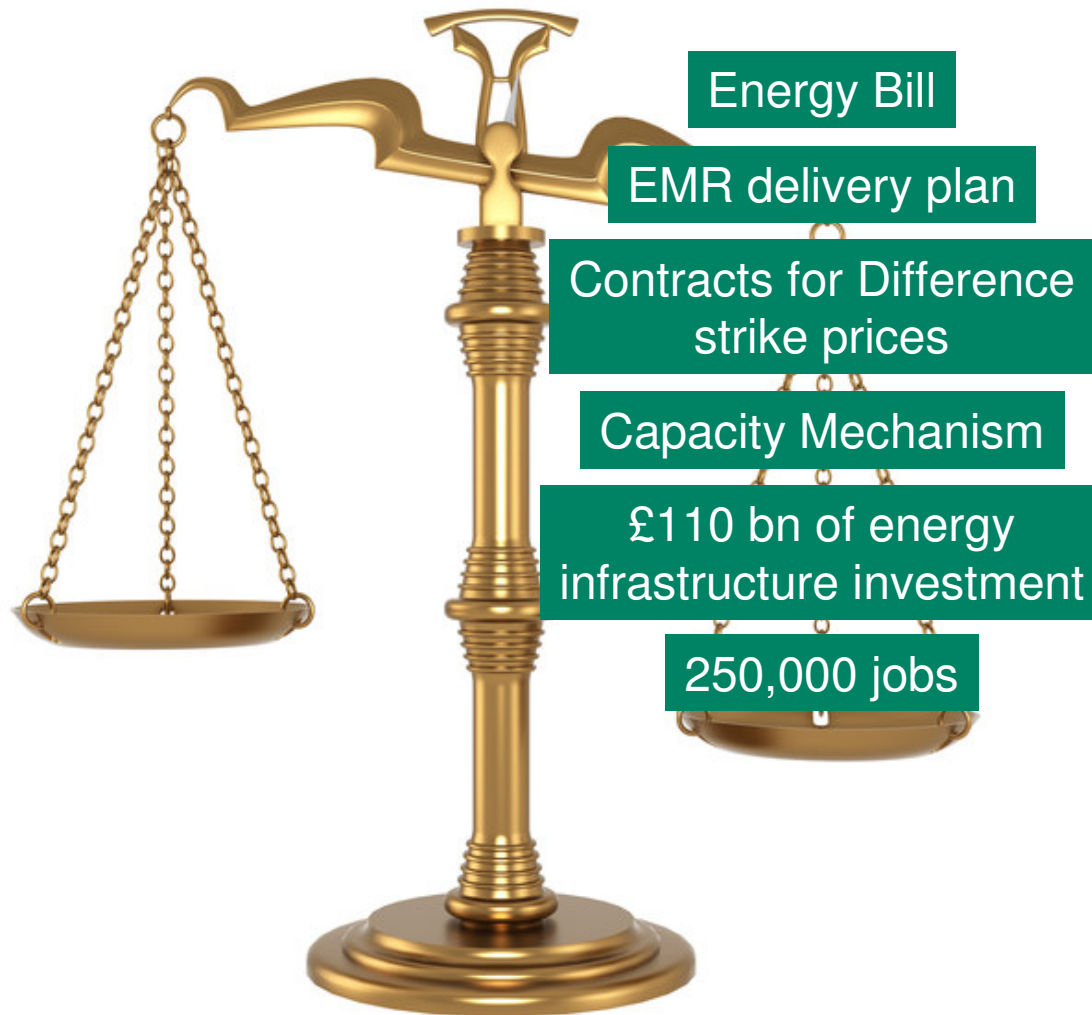
Gone 38 GW



Issues



Progress



Ed Davey



"I would be pretty shocked if investment isn't made over the next 12 to 18 months"

Gone Green: meeting the targets on time is...

“Challenging but achievable”

In summary

Progress within the next 1 to 2 years is critical

Continued development of UK energy policy is essential

Gone Green remains “challenging but achievable”



The clock is ticking...



The race is on...

