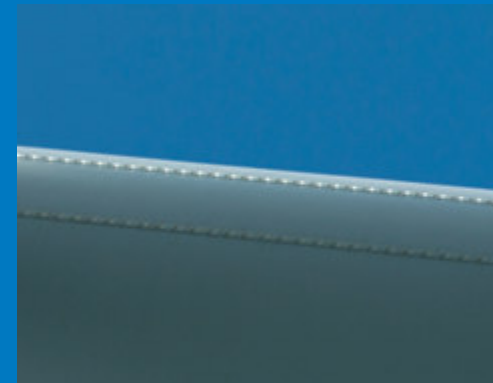
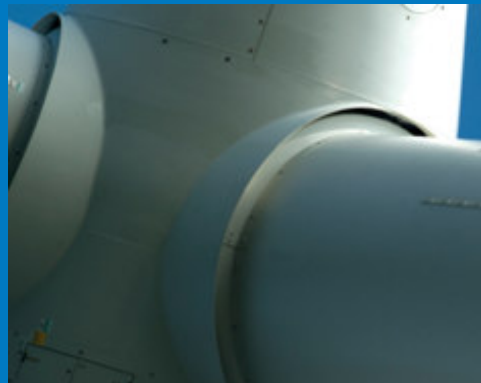


## Signposts to 2020



Gary Dolphin  
Market Outlook Manager  
Energy Strategy and Policy

## Agenda

---

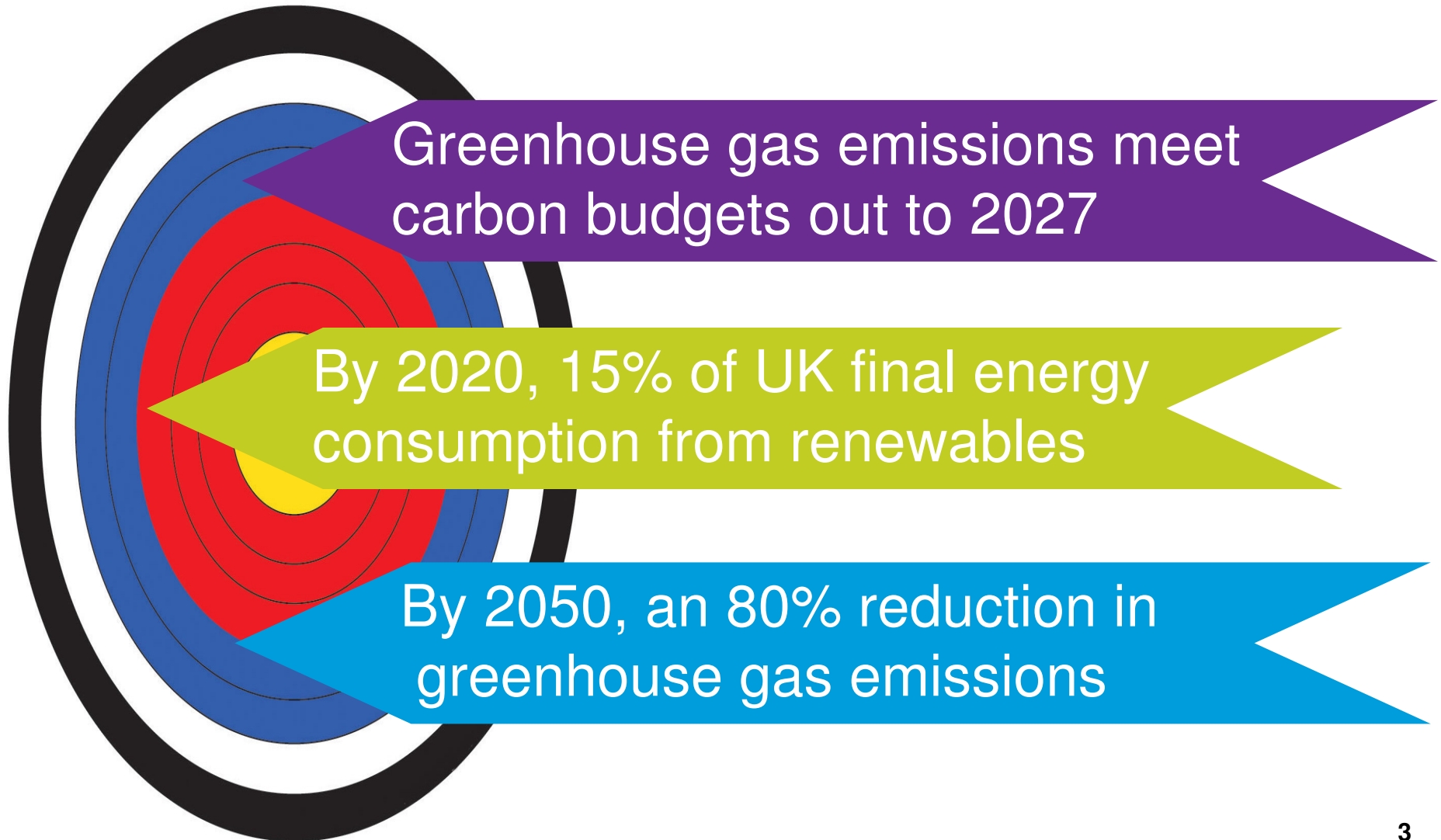
The environmental targets

Gone Green: what needs to happen?

How are we doing?

## Environmental Targets

---



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 <sup>st</sup> 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                              |
| <b>UK</b>    | <b>4.0</b>                         | <b>15</b>                       |
| <b>EU</b>    | <b>10.7</b>                        | <b>20</b>                       |

## Our stakeholder engagement

---

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



London Array Ltd

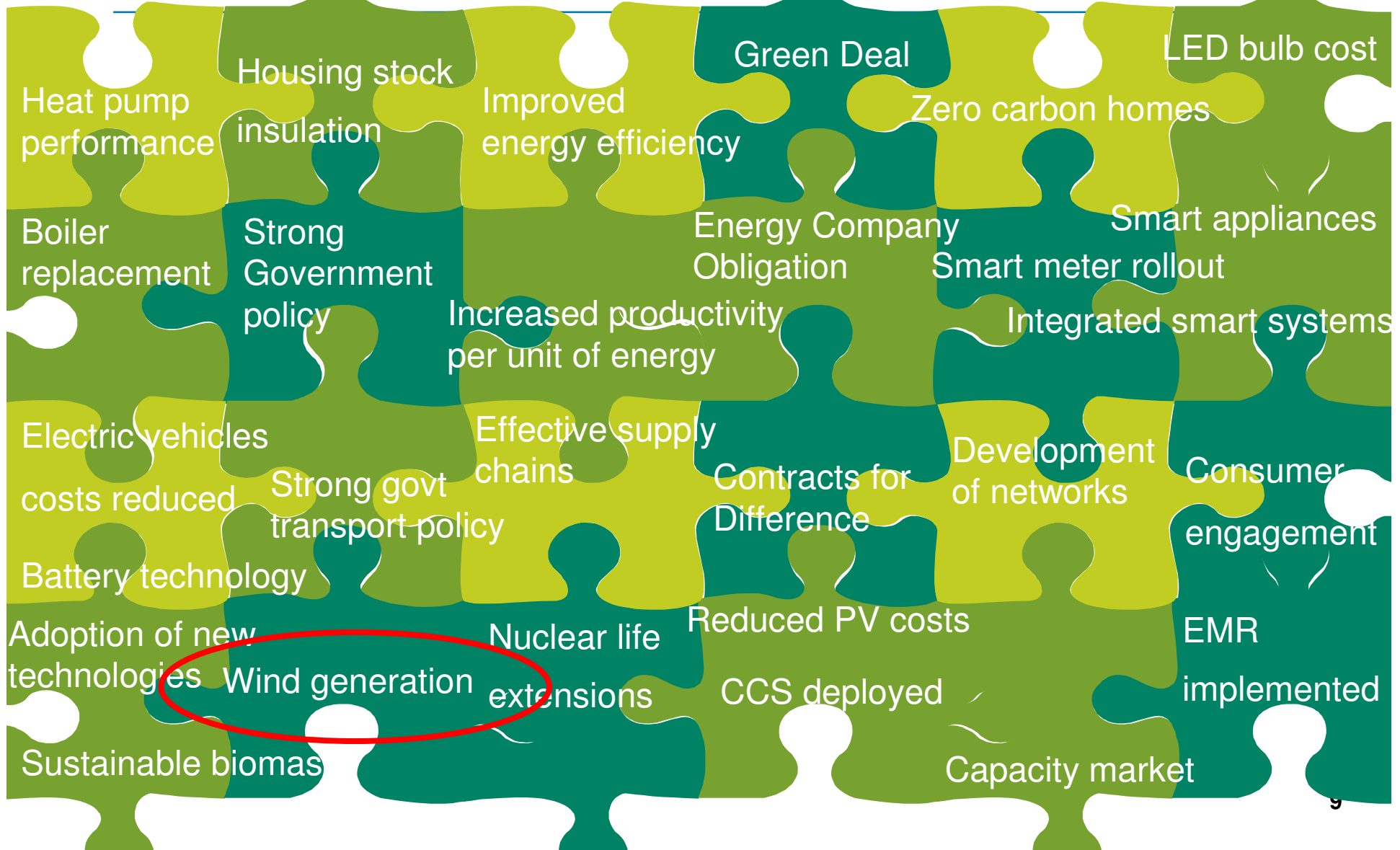
## **Gone Green: meeting the targets on time is...**

---

“Challenging but achievable”



# Gone Green: what needs to happen?



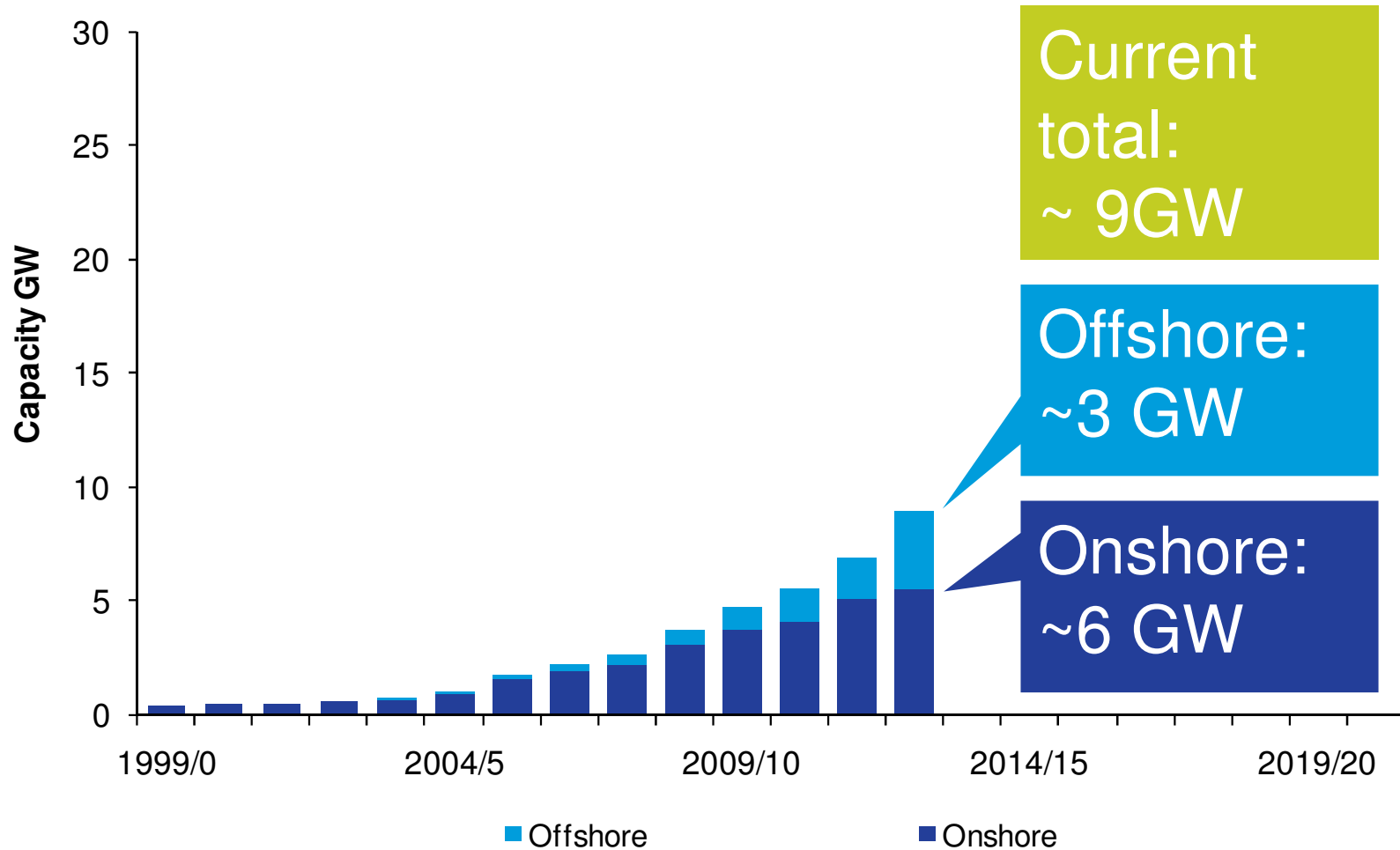
## Gone Green

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

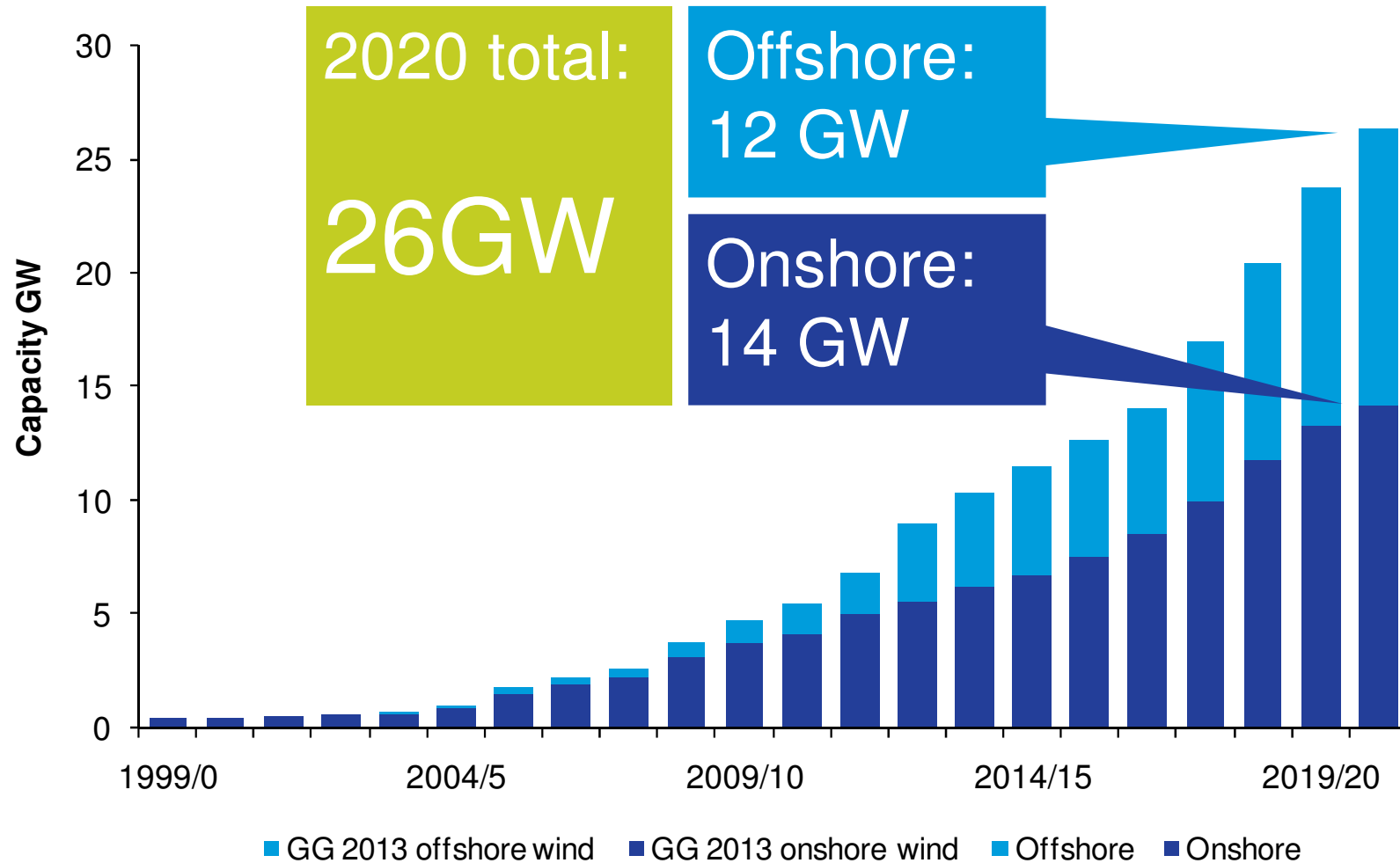
The biggest contribution is from wind



# 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**

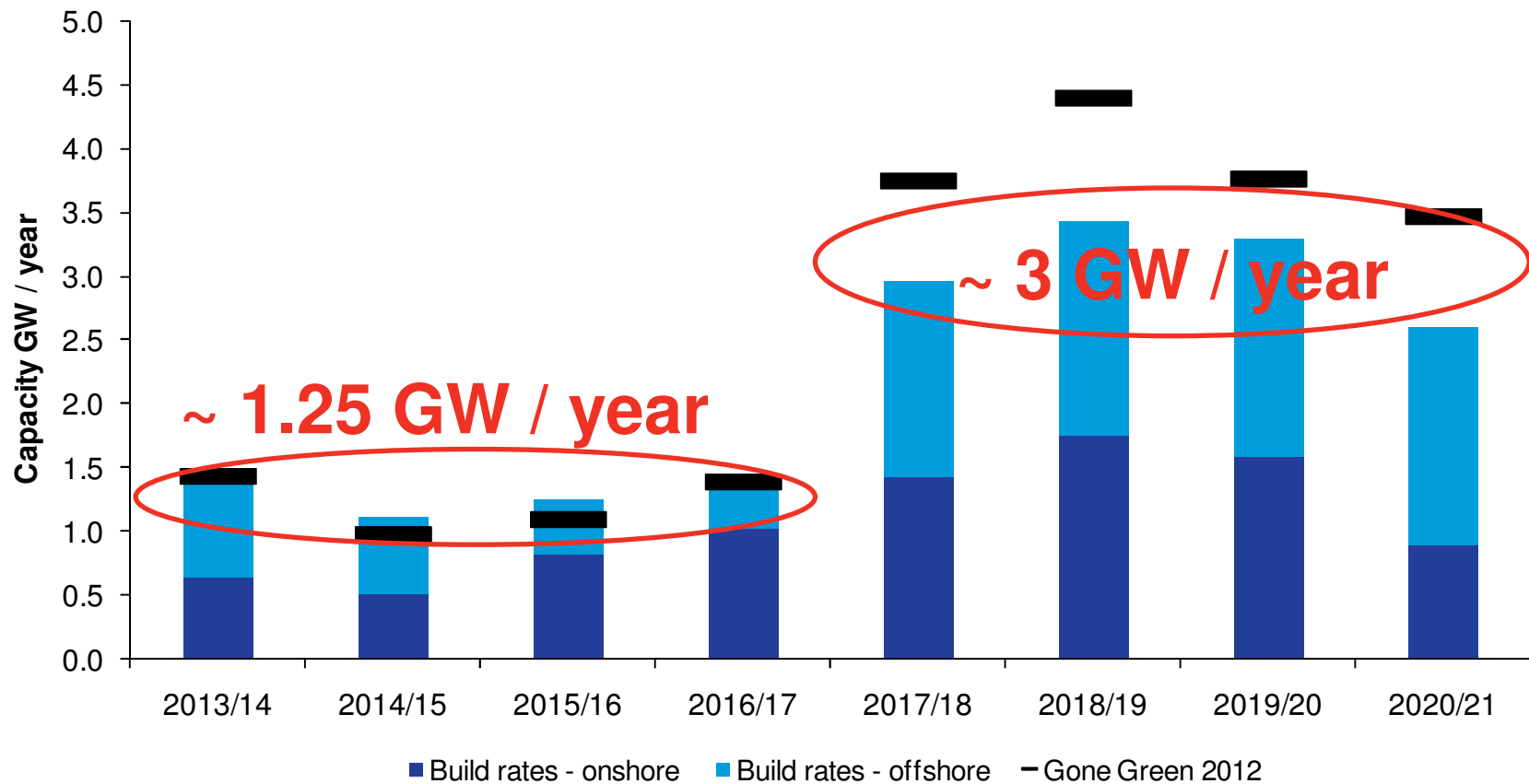
Awaiting consents

**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

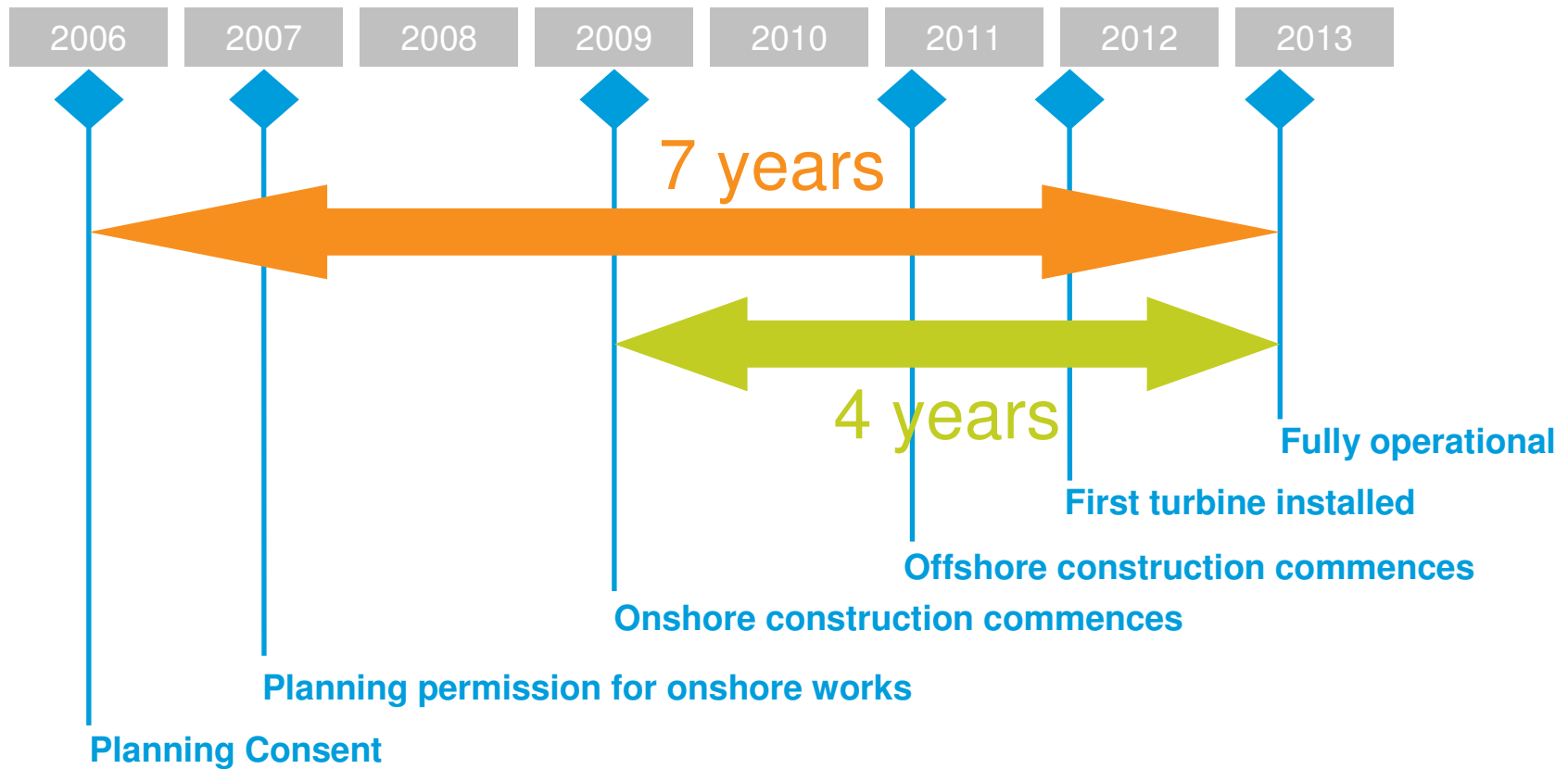
Now to 2020: 9GW offshore = 14 additional London Array Phase 1



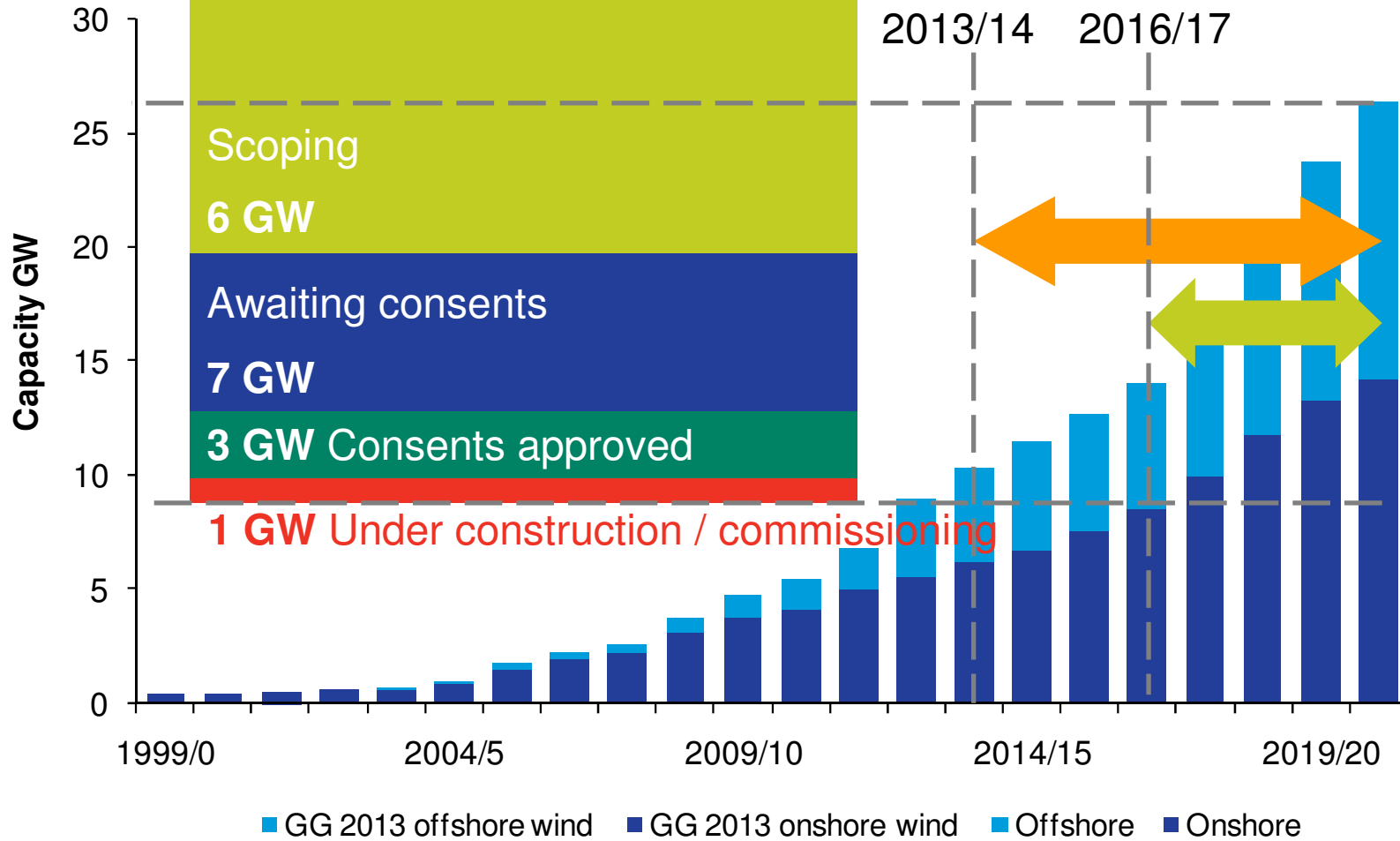
## David Cameron



# London Array



**Gone 38 GW**



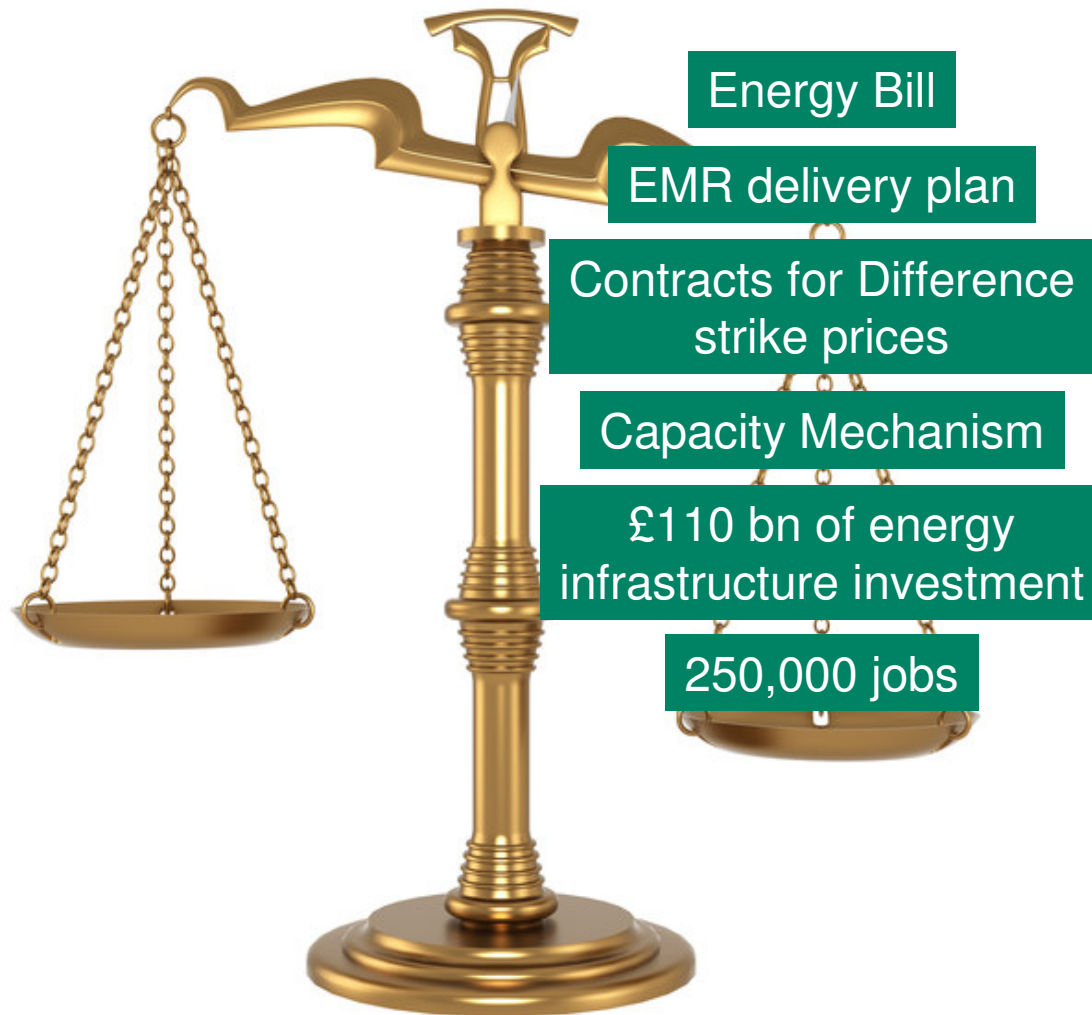
# Issues

---



# 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...

---



nmmacedo

# The race is on...

