

ScottishPower Renewables

Marine Renewables:

Energy or Industry?

Keith Anderson, Director of Renewables

The UK Leads The World in Marine

- Strong political support UK and Scottish Governments
- Now translating to financial and market support
- UK has world-class marine resource
- And leading technology developers
- EMEC provides vital industry support
- Potential for environmental and economic benefit

Export Potential

	<u>Wave</u>	<u>Tidal</u>
UK 2020	2,000MW	2,000MW
UK Ultimate	18,000MW	7,000MW
Global Ultimate	1,500GW	60,000MW

- Global market is 10 to 100 times greater than UK market
- An early lead here = massive export opportunities
- Total global value is hundreds of £bn

Role for Utilities

- Form close relationships with technology companies
- Guide technology development in right direction
- Guide policy towards supportive framework
- Develop projects using utility expertise
- Maximise learning on all fronts:
 - Technical
 - Environmental
 - Commercial

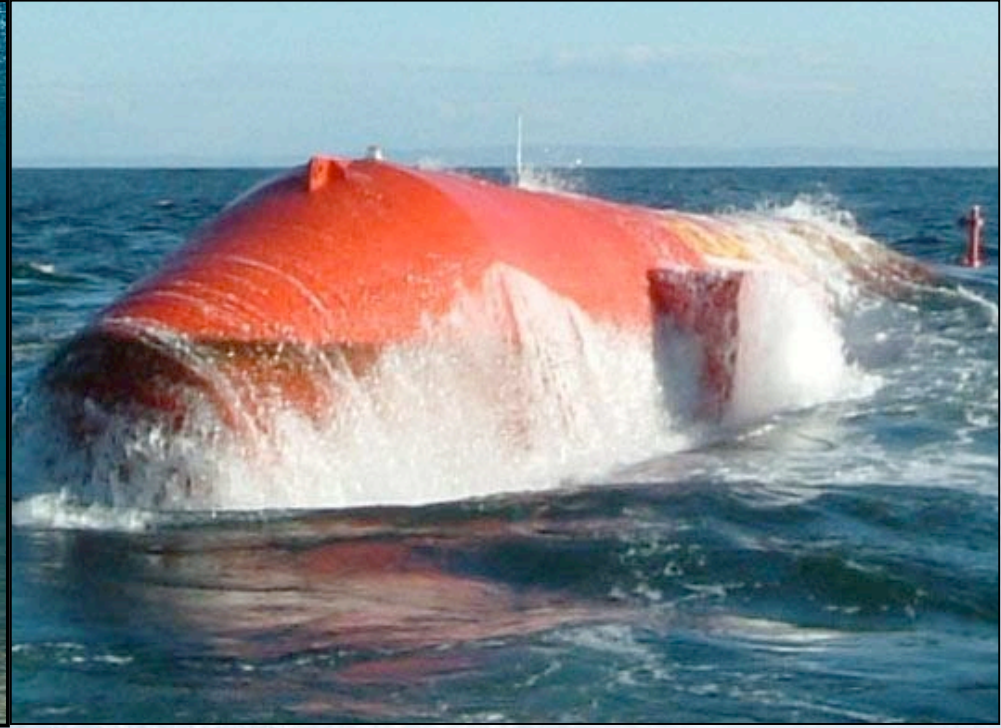
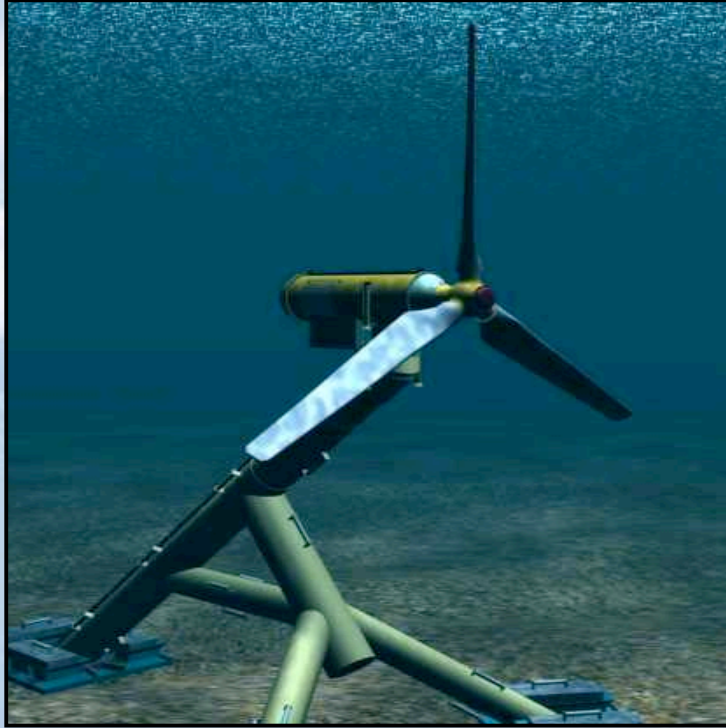
Challenges to be Overcome

Grid: better use of existing capacity
strategic approach to upgrades

Funding: reform of MRDF, extension of WATES
UK-wide market at MSO levels

Planning: preferred development areas
consents decisions should rest with SG/IPC
consistent process throughout UK

Energy or Industry?



It's Both!

Climate Change

Time is running out

Addressing Climate Change Responsibly

www.scottishpower.com