



**SCOTTISHPOWER**  
**RENEWABLES**

## **The Case for Onshore Wind**

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# ScottishPower Renewables



- **ScottishPower Renewables**
  - Onshore: UK's largest onshore developer – over 800 MW
  - Offshore: West of Duddon Sands – 500 MW; Argyll Array – up to 1500 MW; East Anglia – up to 7,200 MW
  - Marine: ambitious plans including application for Pentland Firth leasing round
- **Iberdrola Renovables** - World's No.1 wind operator
  - Over 11,000 MW of installed capacity
  - More than 55,000 MW in pipeline

Moving to newer technologies but want to see onshore continue to flourish



## Onshore credentials

- Delivered strong growth in recent years
  - 1.9 GW operating in Scotland
  - 2.5 GW under construction / consented
  - Over 6 GW in planning / scoping
  - Circa 7% of total generation from wind in Scotland in 2008
- Demands on renewables ever increasing due to EU 2020 target and future needs of transport sector



# Onshore has brought our industry...



- Significant experience in
  - Planning
  - Grid reform
  - Incentive mechanism
  - Skills – environmental sciences, engineering
  - Best practices
    - Habitat management
    - Community engagement
  - Boost to technology – turbine rating grown some 10 x in as many years
  - Created investor confidence in a breakthrough market
    - Difficult against traditional plant and operating regime



## Onshore is a mature technology

- Turbine technology risk is relatively low
- UK sized machines unlikely to grow further (due to landscape and site access restrictions)
- Best choice of today's renewables for investor confidence



## So let's not damage that fragile confidence

- Offshore presents great opportunity but is highly challenged
  - Grid, supply chain, technology, skills....
- Be careful when tinkering with incentive mechanism
- What suits one investor may not suit another
- Industry must maintain pressure on grid & planning reform, and also supply chain & skills
- New technologies – must succeed – but are cash demanding

**Onshore wind must remain a solid foundation stone for confidence to invest in other technologies**

