Overview of North West Renewable Energy Activities

Strategy, Industry and Support.

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Enviro Who ?

- **Not for profit organisation established in 2000.**
- **Funded by the NWDA and local authorities in the region.**
- **Remit to develop and support the regions energy and environmental businesses. i.e create jobs, opportunities, future.**

Why Do We need a Wind/(Renewables) Industry ?

- Government Targets on Climate Change.
- Government Targets on Renewable Energy Generation
- Security of Supply.
- Economic Development.

How Well are we placed today ?

- >2500 Companies Energy Sector (T/o >£5bn).
- Market Value of RE Business is >£2.5m (Wind £1.26)
- >50,000 people employed
- 295 companies, 180 Wind supply chain.
- Projected growth of 8.9%.
- Projected £15bn market opportunity 2020.
- Regional is Local

Renewables: Current Challenge for the NW

	NW	All-England	Share of All-England Target/achievement
Adopted Regional 2010 Renewable Energy target (MW)	937	4,554	21%
Current installed RE (MW)	437	2,303	19%
Percentage of 2010 target achieved	***46.6%***	***50.5%***	
Gap	***500***		

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Addressing the Renewables Gap with On shore Wind

	NW	Total	Percentage of All-England
Current operational onshore wind (MW)	180	639	28%
Onshore wind under construction or approved but not yet built (MW)	23	910	2%
Onshore wind capacity in planning (MW)	176	1,385	13%
Adopted Regional 2010 Renewable Energy Gap (MW)	500	2,251	22%
Approved & in Planning as percentage of gap	***40%***	***102%***	

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To Summarise the Data.

- From 2010 Gap will only increase and there is a lag.
- But NW is
  - Wind Rich
  - Areas of Low Population Density
  - Rich Manufacturing and Engineering Heritage
  - Supply chain in waiting.
  - Where are other growth opportunities… ?

What’s Happening on Ground

NW Planning survey shows:

- **EfW highest contribution PE 443 MW**
- **Commercial wind farms PE 252 MW**
- **Small Turbine Schemes PE 9MW. (Greatest no applications).**
- **90% of refused applications were wind related.**
- **Avg. time for commercial wind farms 330 days.**
- **All applications failed to meet National Targets**

Q. **Are our planning systems giving this opportunity every chance.???**

What are constraints/ Envirolink Partnerships.

- **Land Restrictions**
  - National Parks, Airports, MOD, AONB.
- **Planning System**
  - Lack of certainty, public opposition, and disconnects between national targets and on ground implementation.
- **Finance and Funding**
  - Up front costs.
- **Grid Connection.**
  - Understanding complexity of DNO systems
- **Knowledge**
  - Lack of understanding of systems/supply chain

Summary

- Seen what needs to be done.
- Seen size of opportunity.
- Seen how well placed we are.
- Regional is Local
- Seen the challenges.
- Seen where to get help.

If we don't grab this challenge.

- **10 years ago China had < 2% of Solar Panel Market.**
- **Today China has 46% of World Solar Panel Market**

- ***How do we develop strategies and partnerships to realise this opportunity for the region.?***