

Annual Review 2004



Sea: The Future

BWEA's second annual wave and tidal energy conference

Thursday 3 March 2005

IMAX Theatre, The Science Museum, London

Sponsored by

ScottishPower

renewables

www.bwea.com/marine

UK Offshore Wind 2005

BWEA's fourth annual offshore wind conference

19-20 April 2005

ExCel London

Papers and Sponsorship Invited

www.bwea.com/offshore

BWEA27

18-20 October 2005

Cardiff International Arena



embrace the revolution

Join us in Cardiff 18-20 October 2005 for the UK wind industry's 27th annual conference and exhibition

CONFERENCE

The publication of TAN8 has led to a renaissance of the Welsh Assembly's commitment to renewable energy, along with the recognition that wind will lead the way to 2010. It's been seven years since BWEA last held its annual conference and exhibition in Wales, and the time is right to revisit and embrace the renewables revolution. Over 100 speakers will present in the main plenary sessions and workshop/technical sessions covering a range of onshore and offshore topics, including finance & the RO, development considerations, grid, project delivery, health & safety, technical issues, the regions, supply chain, aviation & MOD and hearts & minds. If you would like to submit an abstract contact Helen Barnes, BWEA Events Manager. Email helen@bwea.com.



EXHIBITION

Our usual exhibition will be back after a break in 2004 for EWEC. Book your stand now to take advantage of early-bird rates. Over 900 square metres of exhibition space available in one purpose built arena.

Cardiff is a vibrant cosmopolitan European capital, which is easily accessible within only 2 hours of London by train and its own international airport offering daily flights to the main capitals of Europe. Located in the heart of Cardiff City, the arena is conveniently situated for all the city's hotels and amenities making it the ideal venue for our event.

SPONSORSHIP OPPORTUNITIES AVAILABLE

www.bwea.com/27



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North Hoyle offshore wind farm © Ian Berry / Magnum Photography

Welcome from Marcus Rand, Chief Executive

Welcome to BWEA's annual review of 2004. This has certainly been an eventful year for the UK wind industry. If I had to summarise it in a few words it would be the year that the industry has grown up and matured. We have seen within our own Association 58 new members join our ranks as our membership has expanded to over 330 companies. BWEA remains the UK's largest renewable energy trade association. Building on the success of previous years we have embarked upon an ambitious plan to invest in new staff and services for our members. We have seen the team here almost doubling in size over the year. We now have a professional team of 12 at BWEA covering all aspects of our expanding industry. Our annual income has grown to over £1.3 million and this year the Association will be spending £1.6 million in the pursuit of its key objectives.

Our wind work has gone from strength to strength. By expanding our onshore team we have managed to focus our time on ensuring that the planning framework for onshore wind is pro-active and consistent. The results of this are now emerging. In 2004 alone some 700 MW of onshore projects have been consented and overall the industry has seen a success rate of over 80% in terms of approvals. 2004 also saw the publication of planning guidance PPS22 and draft guidance TAN8 that calls for an extra 800 MW of new onshore wind within Wales. Both documents are essential to ensure that the industry has a strong and consistent onshore planning framework that delivers timely decisions on applications. 2004 has also seen a significant increase in the number of projects going into planning, driven by the market of the Renewables Obligation. BWEA figures show that some 5 GW of new projects are currently in planning and awaiting a decision. And of course 2004 has seen a record number of projects being built and going under construction.

By the end of 2004 we estimate that some 250 MW of new projects both on and offshore will have been built, nearly a three fold increase on 2003, and that there is a further 600 MW under construction due to be completed in 2005.

Offshore progress has been made with the completion of the UK's second Round One project at Scroby Sands. The foundations have now been put in place at Kentish Flats in preparation for final completion next year. 2004 has also seen pre-consenting work on the larger Round Two projects. These 15 projects have a total combined capacity of up to 7.2 GW representing some 7% of the nation's electricity demands. A number of these projects are expected to move into the formal consenting phase in 2005. The industry also achieved a significant boost in 2004 with the passage of the Energy Act that will enable development of projects outside territorial waters, and also created enabling powers to build a regulated offshore transmission infrastructure. BWEA has established a steering group to guide its offshore work and one of the group's current initiatives is to undertake a major review of the economics of offshore wind to feed into the all important Review of the Renewables Obligation in 2005. BWEA's grid work has also expanded significantly, addressing onshore transmission upgrades and ensuring that the optimum regulatory route for the offshore transmission network is achieved.

BWEA's communication activities have hit the headlines over the past 12 months. Our presence in and on the media has increased dramatically as the debate about the future of energy supply and wind energy has grown and grown. We have launched two campaigns to engage the public on wind energy: *Catch the Wind* and of course our latest campaign, *Embrace the Revolution*. I firmly believe that the public supports

the expansion of wind energy in the UK. *Embrace* has been designed to enable that so far largely silent majority to have their say and to put the wind industry back on the front foot in communicating the benefits that we will bring to the nation. The campaign has seen many firsts for the UK wind industry, not least a national billboard campaign promoting wind energy in key parts of the country. *Embrace* is critical to the future of the UK industry, and is essential in ensuring that the gains we have made both on and offshore over this and previous years are built upon. We have funded *Embrace* in 2004 to the tune of a quarter of a million pounds. 2005 is an election year and we will therefore be dedicating at least that level of financial support again.

2004 has seen another successful conference programme with three major conferences undertaken and a brand new set of planning seminars for Councillors and planners. BWEA's marine conference was the first of its kind and will be followed up in 2005 with another major conference in early March at the Science Museum in London. Our Offshore Wind conference was again oversubscribed so we have moved it to Excel in London's Docklands to accommodate the increased numbers planned for 2005. Our 26th annual conference in Manchester saw a revised and innovative format incorporating an evening cruise taking 250 people to North Hoyle offshore wind farm and a lively debate on the politics of wind hosted by Jonathan Dimpleby. In 2005, in recognition of the role that Wales will be playing in the development of wind energy, BWEA's 27th annual conference and exhibition will be held at the Cardiff International Arena, 18-20 October. Our series of regional planning seminars incorporating a visit to a local wind farm were undertaken over the course of 2004, and achieved an attendance of some 700 planners and Councillors in total. BWEA intends to continue these essential seminars in 2005, supported by the DTI. BWEA also hosted and supported EWEA in the staging of EWEA in London in November 2004. This proved to be a hugely successful event sending a strong signal that the UK is now perceived as a critical market for the global wind industry.

We have also expanded our mission within BWEA to drive a market for the emerging wave and tidal sector. This exciting new area of work has been incorporated within BWEA's work plan. Achievements include the hugely successful first ever Wave and Tidal conference in Bristol in February, the commissioning of a key influential report, *Into the Blue*, that has catalysed a strong consensus on the financing of these emerging technologies, with work this year culminating in the Government announcement of a £50 million marine fund to help commercialise the sector over the coming years.

I hope this review offers a thorough overview of all the work that has been undertaken by the BWEA team, supported by the Board and by our members. The depth and reach of the work is extensive and the achievements have been significant.



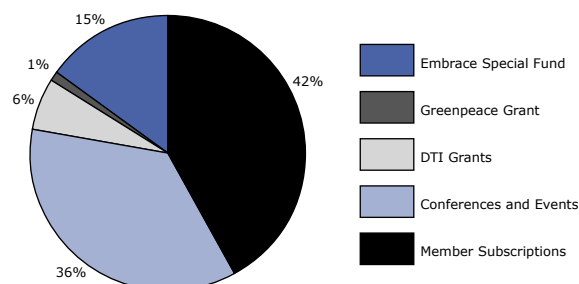
2004 Finance Review

Income

In 2004 the Association's annual income exceeded £1.3m for the second consecutive year. Factors that contributed to this successful increase in revenue were:

- ✎ Membership – 2004 saw the Association's membership numbers continue to rise, breaking the 300 barrier for the first time
- ✎ Conferences & Events – In 2004 BWEA held its first ever Wave & Tidal conference in addition to the third annual UK Offshore Wind conference, held in London, and the Association's 26th annual conference, held in Manchester
- ✎ DTI Funding – Throughout 2004 BWEA received grants from the DTI to fund various activities, including the one-day Planning for Wind Energy workshops, Grid Code work, support for member attendance at overseas events and 50% funding for the *Catch the Wind* children's design competition
- ✎ *Embrace the Revolution* – In 2004 the Association raised an extra £200,000 from members to help finance the *Embrace* campaign
- ✎ Greenpeace Funding - BWEA received a grant to support the post of Marine Renewables Development Manager.

The graph below highlights the income for the Association in 2004:

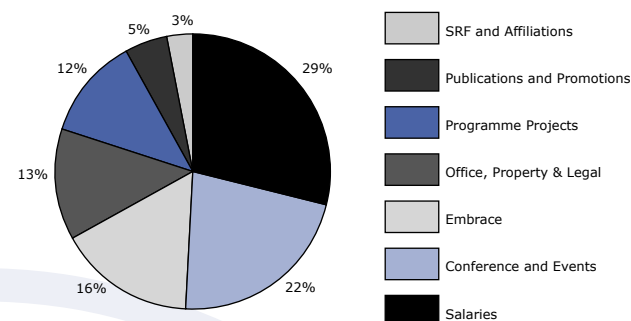


Spend

The Association's spend in 2004 reached almost £1.6 million as the Board authorised a spending down on the Association's reserve. Key initiatives included:

- ✎ Increasing staff levels to 12 full-time employees. Extra staff were recruited to boost communications, planning, grid and wave and tidal work
- ✎ *Catch the Wind* children's competition, inviting children aged 7-10 and 11-14 years to send in their perception of wind energy in an image. Winning entries in both age categories were put on display at the Science Museum in London
- ✎ *Embrace the Revolution*, a nationwide campaign launched in September and funded with £250,000 in 2004
- ✎ Public Affairs – The Association engaged a Public Affairs agency to assist and advise with the political lobbying work of BWEA throughout the year, including attending all party political conferences
- ✎ Funding a series of planning workshops for Councillors and planners in England and Wales, supported by the DTI
- ✎ Investment in the Association's communication activities including the production of a new set of marketing and information materials
- ✎ The funding of a full-time member of staff within the Scottish Renewables Forum to work exclusively on wind.

The graph below breaks down the Association's 2004 spend by category:



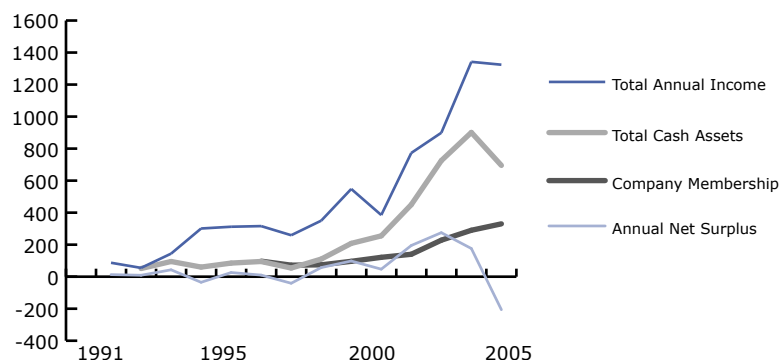
BWEA Membership

During 2004, BWEA membership has increased by 58 companies and the level of service also increased significantly.

Membership Growth

BWEA membership has more than tripled over the past three years and the organisation has more than doubled in size. The overall activity and level of service has increased significantly. BWEA has ambitious plans to further increase the work of the Association as we enter a critical period for the wind industry.

Growth of BWEA 1991-2004



Membership Services

eNews was introduced at the beginning of 2004 and has proved to be a valuable addition to membership benefits, delivering daily hyperlinks to top news stories online. 60% of BWEA members use the eNews facility every week. BWEA reviewed the eNews contract at the end of November 2004 and decided to change providers from Magenta to NewsPing. The new provider covers significantly more sources in the UK and will therefore afford far greater coverage. Usual members alerts will be enhanced with a newsfeed at the members area of the BWEA website.

Members have used the eNews service to differing degrees with some taking full advantage of the service, adding additional users, changing agents for search terms and key words and forwarding information, while others simply read their daily alerts.

- ✿ 27 members have added additional users
- ✿ 116 members have changed their agents

- ✿ 8 sponsors have added users and changed agents
- ✿ 25 members have added additional agents
- ✿ 5 members/sponsors are monitoring tenders

Another additional information service in 2004 has been a Public Affairs newsletter provided by Citigate, which BWEA distributes to Company, Sponsoring, Corresponding and Academic subscribers. This has been keeping membership abreast of parliamentary issues as the wind industry generates more political interest.

Key services to be provided by BWEA in 2005 include (new services in blue):

- ✿ *Embrace* campaign continued and funded from central funds to at least £300,000 in 2005
- ✿ Political and Public Affairs programme during election year and Review of the Renewables Obligation
- ✿ Launch of new BWEA newsletter for members and stakeholders - from Jan 2005
- ✿ eNews service - providing daily media updates
- ✿ Expanded BWEA team providing dedicated support in key areas of industry's development (planning, grid, offshore, aviation, consenting, finance and marine)
- ✿ Expanded events programme including continuation of regional seminars for planners and Councillors in 2005
- ✿ Monthly update to corporate members on status of wind projects via an automated UKWED database
- ✿ Free access to all corporate members to marine work of the Association
- ✿ Expansion of BWEA activities on small wind systems
- ✿ Re-designed BWEA website incorporating expanded sections on offshore, marine and small systems.



BWEA members admiring North Hoyle offshore wind farm on the boat trip at BWEA26, July 2004 © BWEA

Events

BWEA organised three major conferences in 2004 and participated in several other important events in the UK and abroad, including the Labour Party's annual conference in Brighton. BWEA helped to organise and promote the European Wind Energy Conference, hosted by the UK in November. In addition, a series of regional workshops was delivered to local planners and Councillors throughout the UK.

BWEA Wave and Tidal Energy Conference

BWEA teamed up with Regen SW, the renewable energy agency for the South West of England, to present a one day conference on wave and tidal energy. The event, held at the IMAX Cinema in Bristol in February 2004, sponsored by Garrad Hassan, was the largest event of its kind anywhere in the world. 250 delegates joined BWEA in addressing the changes to policy and finance that will be needed to get



Marcus Rand, BWEA CEO and Gordon Edge, Head of Offshore Wind with Cherie Booth at the Labour Party Annual Conference & Exhibition in Brighton, September 2004 © Gus Campbell Photography



BWEA Regatta June 2004. Photo supplied by npower renewables © Hamo Thornycroft

wave and tidal current technology to market. Presentations included perspectives from the marine renewables industry, manufacturing, financiers, the DTI and NGOs. Key speakers included then UK Energy Minister Stephen Timms MP; Tom Delay, Chief Executive of The Carbon Trust; Stephen Tindale, Executive Director of Greenpeace UK and many industry figures. A scale model of the TiDel device by SMD Hydrovision was on display to delegates to show the reality of this set of emerging technologies.

UK Offshore Wind 2004

In March BWEA held the 3rd annual dedicated offshore wind conference, sponsored by AMEC Wind Energy and Centrica.

Over 450 people attended the two day event to network and listen to the impressive panel of speakers, including then Energy Minister Stephen Timms MP.

The conference allowed key players and stakeholders in the industry to meet and exchange experiences, with delegates including representatives of Round One and Two project developers, offshore contractors, turbine manufactures, insurers and financiers, together with contributions from the RSPB and the MOD which helped raise the profile of the event.

BWEA26 – Build and Deliver

Over 500 people attended BWEA's 26th annual conference in Manchester in July, sponsored by Barclays, which was held without the usual exhibition as this was combined with the EWEC event held in the UK later in the year. The event's major successes were securing a cross-party political consensus on the future of the Renewables Obligation, following a heated debate by frontbench energy



Then UK Energy Minister Stephen Timms MP opening BWEA26 © BWEA



Jonathan Dimbleby chairing the debate at BWEA26 © BWEA



Planners and Councillors visiting High Volts wind farm at the BWEA Planning for Wind Energy workshop for the North East region © E.ON UK Renewables

spokesmen from each party and Wind Energy: The Debate, hosted by television and radio presenter Jonathan Dimbleby (see photographs above). Panelists Simon Reddy from Greenpeace UK and Ian Mays from Renewable Energy Systems fought an excellent verbal battle with Mark Avery from the RSPB and Brendan Hamill from the anti-wind campaign group, Scottish Wind Watch.

The third annual BWEA Sailing Regatta was held in June 2004, sponsored by npower renewables. A record number of keen sailors gathered in the Solent, off the coast of Portsmouth, for a full day's sailing. A total number of 27 boats took part, with crews ranging in experience from those who had never been on a boat before to competent skippers and sailors. The prestigious BWEA Regatta trophy was awarded to the winner, npower renewables under skipper Alan Moore, at the BWEA26 conference Gala Dinner. The now traditional wind industry Regatta will next be held in September 2005, with the award being presented at BWEA27 in Cardiff in October.

Events

Planning for Wind Energy regional workshops

In June and October 2004 BWEA began a highly successful series of regional workshops for local Councillors and planning officers, informing them of changes to planning policy and dispelling the myths associated with wind energy. A total of 700 planners and Councillors attended the seven events and all were taken to visit a modern working wind farm, with encouraging results. The series is part-funded by the DTI and continues in Spring 2005.

2004 EWEC

BWEA acted as one of the major supporters of the wind event of the year - 2004 EWEC - held in London in November. This was the largest ever European Wind Energy Conference and its location demonstrated not only that the UK is serious about wind energy, but the recognition of the potential of the UK market within Europe. Patricia Hewitt, Secretary of State for Trade & Industry, opened the event, attended by over 4,200 participants and 255 companies exhibiting, with the UK contingent the highest ever representation from the host country. BWEA hosted the now traditional UK Village at the exhibition, and also organised a lunch reception with Energy Minister Mike O'Brien MP, which included a cake cutting ceremony to celebrate the first birthday of npower renewable's North Hoyle offshore wind farm.



Marcus Rand, BWEA CEO with UK Energy Minister Mike O'Brien MP cutting North Hoyle first birthday cake at EWEC © BWEA

BWEA Tree Workshop

In March, BWEA held a Tree Workshop in Glasgow where nearly 100 members attended to hear the latest research and advice from experts and to discuss technical issues relating to wind turbines and trees. BWEA intends to expand its Technical Workshops in 2005, beginning with an event on wind prediction methods.

Other Events

BWEA continued with its role as a supporter of the Aberdeen All-Energy Opportunities conference and exhibition in May 2004, jointly with the Scottish Renewables Forum.

BWEA was awarded UK Trade & Investment funding to take several UK companies to exhibit at wind events abroad. As well as hosting a UK Village at a brand new

trade fair organised by Hamburg Messe, WindEnergy in May 2004, a smaller group flew across to Chicago to exhibit at Global WINDPOWER 2004 in March, organised by the American Wind Energy Association.

BWEA took out its first ever exhibition stand at the Labour Party Annual Conference in Brighton in September 2004. With the brand new *Embrace the Revolution* branded stand, BWEA staff gained lots of support for the campaign, raising the profile of both the Association and the campaign in political circles. BWEA also attended the Conservative and Liberal Democrat Party Conferences.

Key Events in 2005

- ✿ Sea: The Future - The second BWEA Wave & Tidal Energy Conference, 3 March 2005, The Science Museum, London
- ✿ BWEA UK Offshore Wind 2005, 19-20 April, ExCel, London
- ✿ WINDPOWER 2005, 15-18 May 2005, Denver Colorado
- ✿ All-Energy Opportunities, 25-26 May 2005, Aberdeen
- ✿ HUSUMwind, 20-24 September 2005, Germany
- ✿ BWEA27 - the UK wind industry's 27th annual conference and exhibition, 18-20 October 2005, Cardiff International Arena

See www.bwea.com/events for further details.

Campaigns

Embrace the Revolution

The wind energy debate has intensified over the last year. The media portrayal of this debate continues to emphasise the myths, giving rise to the misconception that wind energy in the UK is neither progressing nor popular.

This is far from the case, as not only is 2004 a record year for the wind industry, but four more opinion polls have been published, all demonstrating once again the consistently high level of support for wind energy. Previous studies have shown that this support increases once a project has been built and is highest of all among the residents near wind farms. Yet this side of the story is often not heard, and wind energy remains misunderstood and as such, contested.

Hence the need for a national campaign that unites those in favour of wind energy and challenges the myths that wind farms are unpopular, noisy and a blot on the landscape. *Embrace the Revolution* aims to get people talking about wind energy in a different way and provides a vehicle for the so far largely silent majority to show their support.

Campaign overview

The campaign was launched on 20 September with the results of new research carried out by NOP showing that the majority of the population - 74% - agree that wind farms are necessary to help meet current and future energy needs in the UK, despite a vocal campaign against their expansion. The launch also featured a list of high profile celebrity champions from the worlds of design, architecture, music and the media, such as broadcaster Chris Tarrant, designers of the London Eye Julia Barfield and David Marks, architect Lord Norman Forster, musician Guy Berryman from Coldplay and even the Mayor of London. Just as important, although not so well-known, are the local champions, real people who live near wind farms and are happy to share their experiences. There is now a network of local supporters of wind energy across the UK, ready and willing to speak up in favour of wind energy.

Celebrating the aesthetics of wind energy, in partnership with Magnum photographic agency, four photographers were commissioned to take unexpected and evocative pictures of wind turbines, which formed the basis of a month-long outdoor exhibition beside the London Eye on London's South



Marcus Rand with Patricia Hewitt, Secretary of State for Trade & Industry with *Embrace* ad van at EWEC © EWEA



Julia Barfield, one of the designers of the London Eye and UK Energy Minister, Mike O'Brien MP at the *Embrace* Magnum Photography exhibition, London © Peter Jordan



Embrace the Revolution billboard launch © Lloyd Smith

Bank in October. These images are now available as a mobile exhibition to tour the country and support BWEA members and stakeholders in their local activities.

November saw a first for the UK wind industry with the launch of a national billboard campaign, with over 350 posters in 120 locations across the country, concentrating on locations where there is either an existing wind farm or an application to build one. The 48 sheet posters have also featured on mobile ad vans, used to promote the billboard campaign launch outside Holyrood, with cross party MSPs Nora Radcliffe, Bruce Crawford, Sarah Boyack and Shiona Baird all posing for publicity shots, and also at EWEC 2004 in London, with Secretary of State Patricia Hewitt consenting to a quick snap.

The campaign also ensures continued coverage by placing positive stories, through its agency The Forster Company. Successes so far include five national stories, *The Times*, *The Telegraph* and *The Observer*, a consumer article in *Country Living* magazine, and six regional stories, and a feature on what to do with the kids at half term, where visiting a wind farm was listed in *The Independent's* top 50 activities.

Campaign tools

The internet is the key tool for *Embrace the Revolution* and is the basis of the call to action. BWEA's new website www.embracewind.com features a simple sign-up form that allows people to pledge their support, with the added incentive that names collected will be put on the sides of turbines to be erected in 2005 in each of the regions - Scotland, England, Wales and Northern Ireland - a monumental testimony to the popularity of wind power!

By week 11 of the campaign an impressive 11,000 names had already been registered. Equally impressive is that more than 20% of these people, 2,300, used the website to take further action and send a letter to their parliamentary representative, whether an MP, AM or MSP.

Postcards featuring the Magnum photography have also been widely distributed, in two formats, one a simple sign-up and one for people to send on to their parliamentary representative. Already over 500 have been returned to the BWEA offices with additional pledges of support, and their effect has also been noticed in political circles.

Campaigns

Other campaign materials include *join the revolution* car stickers and pin badges, which have featured on the lapels of many prominent Ministers, politicians and stakeholders. All campaign artwork is available on CD toolkits so that members can print off as many items as they need, from billboard posters to the *Embrace* logo for inclusion on company literature.

Embrace the Revolution has proved to be an innovative and successful campaign, with a media circulation to date of 38 million, uniting the wind industry and its supporters, and will be built on in 2005 to further enhance the positive messages of the UK wind industry.

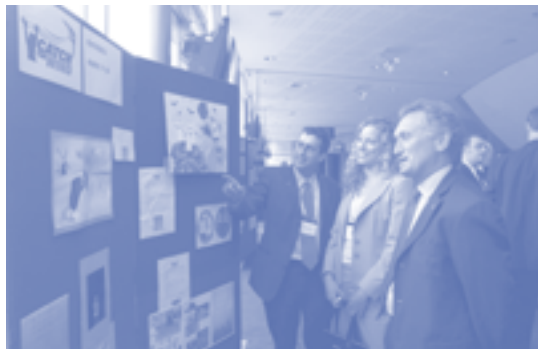
Key messages

- Climate change is a reality
- Wind is working
- Let wind lead the way
- Embrace the Revolution*

Catch the Wind

Catch the Wind was a children's design competition, inviting children across the UK to draw, paint or take a photograph to show people what wind energy means to them, with prizes of wind surfing lessons and stunt kite kits awarded to one winning entry and five runners-up from two age categories (7-10 and 11-14 years). Jointly funded by the DTI, the aim was to raise awareness of the positive benefits of wind energy as a sustainable energy resource among the public and the media.

Different mechanics were developed to make sure that children found it easy to enter the competition; a website (www.catch-the-wind.com) which featured a downloadable entry form along with details of the competition and information about wind energy, a flyer and a poster with competition details and entry forms, both of which were distributed widely.



Marcus Rand, Juno Sambrook and Alan Moore judging the *Catch the Wind* children's paintings at BWEA26 © BWEA

To ensure maximum reach, media partnerships were developed with *The Sunday Times* (a *Sunday Times* supplement reaching over four million children) and *The Newspaper* (distributed to 6,200 schools nationwide) who

promoted the competition and the benefits of wind energy. Future coverage has also been secured with BBC's Blue Peter for early 2005.

Awareness of the competition was also raised via partnerships with three relevant venues, the Science Museum in London, Eureka! The Museum for Children in Halifax and Our Dynamic Earth, Edinburgh. All encouraged entry by distributing competition leaflets and promoting *Catch the Wind* onsite, through posters or digital media. Both the Science Museum and Eureka! also displayed the winning entries as part of a larger exhibition on wind energy.



Catch the Wind winner: age 7-10 category

Catch the Wind winner: age 11-14 category



The competition commenced in March, with a celebrity launch at Bears Down wind farm in Cornwall in April, with campaign spokesman Children's BBC presenter Nick Baker. Campaigning then continued until the competition deadline at the end of May to ensure ongoing media interest and impact amongst children across the UK and in turn, their parents.

The wider media campaign targeted national and regional press and consumer publications, such as *Chat*, *That's Life* and *Take a Break*. These included special reader offers and competitions, along with reinforcement of the campaign's key messages.

Results

At its simplest level, the competition was a huge success, with over 784 entries, 70% in the 7-10 year old age group. By comparison a similar competition for a well known consumer brand achieved only 200 entries. However well the competition was received, this was not the main objective of *Catch the Wind*. The key benefits were the communication of the positive story of wind energy to an audience of up to six to seven million parents and children through a variety

Campaigns

of media – print, broadcast and exhibition venues. Furthermore, the project specifically targeted rural areas, through the print media chosen, to help provide a positive interest in wind energy in key locations for the industry’s development in the UK.

In every area where targets were put in place for coverage, the campaign consistently exceeded expectations, particularly noticeable in the website and regional print, a job well done by the campaign’s communications agency, Hill & Knowlton.

“There is something very inspiring about wind farms - I think the turbines are awesome! The Catch the Wind competition aims to use this inspiration to get children talking to their parents about renewable energy and get really creative with their designs.”

Nick Baker, Children’s BBC television presenter (pictured below with children at the celebrity launch at Bears Down wind farm, April 2004).



Key messages

- ✎ Wind energy is popular
- ✎ Wind energy helps the environment
- ✎ Wind energy brings benefits

Success in meeting *Catch the Wind* campaign objectives

Media Type	Targets	Achieved
National and Consumer print media	3 – 5	8
Regional print media	10 – 15	36
Broadcast media	10 – 15	15
Online media	0	5

Venue	Targets	Achieved
Venue Partner Footfall	300,000	613,333*
*Based on venue estimates		

Entry Mechanics	Targets	Achieved
Website Hits	1,500 – 2,000	5,150
Leaflet Distribution	50,000	50,000

TOTAL REACH	26,332,673
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Public Affairs

In the summer of 2004 BWEA engaged Citigate Public Affairs to support its lobbying programme within Westminster. An intensive programme of meetings with MPs, advisors and researchers has been undertaken and BWEA will be working closely with PRASEG in 2005 to implement an extensive series of events and discussions on wind energy to further raise the profile within Parliament.

Programme Overview

BWEA at home and abroad

BWEA has representation in Scotland and Europe, through its place on the Boards of both the Scottish Renewables Forum and the European Wind Energy Association.

Europe

The EU Renewables Directive is the key policy at a European level which impacts on the future of the wind industry in the UK and has therefore been deserving of much of BWEA's time. In 2005, the Commission has the option to propose a harmonised system of support for renewable electricity across the Union, and the European Wind Energy Association set up a taskforce, including representation from BWEA, to decide the wind industry's input to this process. The results are encouraging, both in terms of process and outcome. The European industry has arrived at a lobbying position – revealed at EWEC in November – which is both workable and agreed. Much depends on the new Energy Commissioner, but EWEA believes the permanent Commission staff in Brussels are in agreement with the industry's position. Simply put, the common front is to argue against harmonisation at this time, while working on other areas in order to prepare the way for harmonisation further down the line.

Scottish Renewables Forum

BWEA is on the Board of the Scottish Renewables Forum and in addition funds their Senior Wind Officer, who has supported both SRF, the renewables trade association in Scotland, and BWEA in their drive to establish and maintain a sustainable market for wind energy in Scotland.

In post for little over 12 months, SRF's Senior Wind Officer has actively promoted and, at times, defended, the Scottish wind industry. SRF has also developed positive relationships with key stakeholders such as Scottish Natural Heritage, the Scottish Executive, the Scottish Parliament and Scottish local authorities.

Key Issues in 2004

The key focus of BWEA's activities in 2004 has been lobbying to remove short term barriers to wind energy development and winning back the public's hearts and minds.

Onshore

- PPS22
- TAN8
- Aviation
- Eskdalemuir
- Regional workshops for planners and Councillors
- Small Systems

Offshore

- Energy Bill
- Round Two lease negotiations
- Health & Safety
- RO Review – Terms of Reference

Grid

- Onshore
- Offshore
- Grid codes
- Variability

Communications

- Embrace*
- Public Affairs
- Myth busting
- Publications

Marine

- Reaching consensus on financing the future

Onshore

To say that 2004 has been a good year for onshore wind is an understatement: it's been a great year. A record 191 MW has been built and a record 700 MW consented, representing an approval rate of over 80% approval rate, and with more than 500 MW already under construction, 2005 promises to be even more successful.

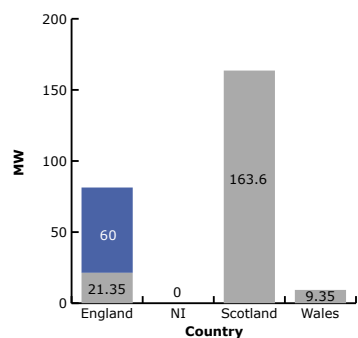
There is of course more work to do if industry is to maintain the progress required to deliver the Government's 2010 renewable energy targets. Complacency is not an option as there are still challenges to overcome.

In July BWEA released its study into planning delays showing that the average time for achieving final planning consent for a wind farm application is 14-30 months (depending on country), as opposed to the 16 weeks it should take for determination of major developments requiring an Environmental Impact Assessment. Consenting delays are strongly apparent in Scotland, primarily due to the log jam that is being felt from Section 36 (S.36) cases which make up nearly 3.5 GW of the 3.9 GW currently awaiting determination in Scotland. With more than 1 GW in planning or awaiting S.36 determination elsewhere in the UK, good planning advice and decision maker awareness is paramount.

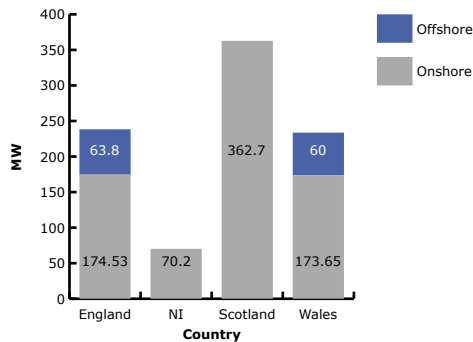
Planning Policy

Thankfully, the positive planning guidance of NPPG6 in Scotland has now been mirrored in England with the publication of PPS22 in July. Three years in the making, PPS22 is the new planning policy statement published in line with the Government's Energy Policy to take account of the national need for renewable energy. PPS22's essential ingredient is its call for all issues to be balanced with local environmental, social and economic considerations and the national need for renewable energy. It encourages criteria based policies in development plans to

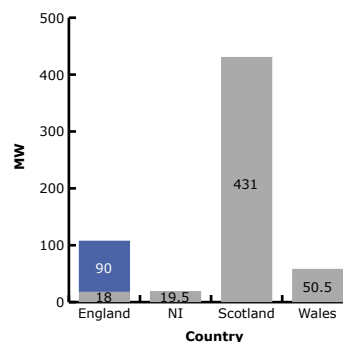
Built in 2004 - 254.3 MW



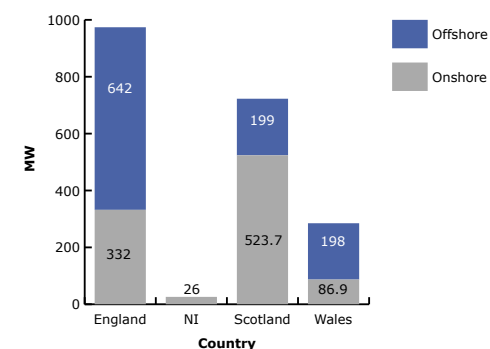
Built in Total UK - 904.87 MW



Under Construction - 616.95 MW



Approved - Not yet built or Under construction - 2007.5 MW



allow for national and local factors to be considered in decision making. Provided the national statement filters down to development plans, England should receive more consistent decision making for wind farm developments. Time will tell, but it is already evident that there is increased developer confidence as with 321 MW put forward, 2004 has been a record year for submissions in England. The industry now eagerly awaits the PPS22 Companion Guide, and hopes for a document which aids planning officers in designing their policies in line with the national policy statement.

In Wales too, there is optimism as the Welsh Assembly published its long awaited consultation draft of TAN8 in July after four years of developer anticipation. Imposing a strategic approach to meet its aims, the Assembly has made a first by inserting a dedicated onshore wind target of 800 MW by 2010. The consultation period has ended and BWEA's Onshore team is continuing to work with the Assembly to ensure the policy mechanisms are in place to meet the target. In short, on advice from members BWEA believes there is a need for additional strategic areas, extensions to the proposed areas and new criteria based policies for projects which lie outside the strategic areas, the latter to allow the great number of projects to move forward which have already received significant developer investment.

With the national policy statements either in place or close to adoption, BWEA continues to monitor development plans and press for policies which are positive and consistent with national policy. Monitoring has been underway since January 2004 when the Onshore



Cruach Mhor wind farm © ScottishPower

Onshore

team expanded with the appointment of a Planning Advisor. BWEA has prepared a substantial number of plan representations at the regional, county and local level. These can be viewed at www.bwea.com/planning (or see Appendices). As a result of submitting development plan representations, BWEA has been invited to attend EIP's (Examination in Public), and has used such opportunities to provide a voice for the industry in the plan-making process.

Regional Planning Conferences

Not only is the policy guidance improving, but so too is the awareness building. In partnership with the DTI, BWEA launched a series of Regional Planning Conferences for planners and Councillors, providing expert information, wind farm site visits and even turbine tours. There is no substitute for those who have been previously uncertain of wind energy to see and hear the reality of the technology for themselves. March 2005 will see the completion of the first series of conferences with events in the East Midlands, Wales, Scotland and Northern Ireland. So far seven events have been held with around 700 planners and Councillors attending. Such is the success of the series, it seems likely BWEA will be repeating the exercise with a similar series of events later in 2005 and into 2006.

Aviation

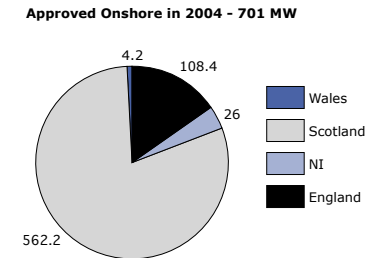
It has not all been rosy of course and there have been long and difficult roads to negotiate in moving forward with aviation. There was certainly an air of disbelief when the industry was welcomed back in the New Year with the new challenge of Eskdalemuir. Following receipt of data from their American counterparts, the MOD put an 80 km exclusion zone around the Eskdalemuir seismic array, used to monitor the nuclear test ban treaty and under strict regulation by the CTBTO. However, positive joint working between departments within MOD, DTI and industry has led to speedy progress. The initial 80 km exclusion zone has since been reduced to 30 km and a final recommendation is expected before the end of 2004 which all parties hope will reduce the affected area even further.

There are a number of other initiatives being progressed with the aim of finding workable solutions to the radar problem which are acceptable to aviation regulators. BWEA has been working closely with the DTI to



Councillors at High Volts wind farm June 2004
© E.ON UK Renewables

progress an initiative known as the AMS Advanced Digital Tracker (ADT). The ADT has the potential to resolve radar issues around many civil airports and military air traffic radars, freeing up a significant number of wind farm projects. The ADT has the support of MOD and NATS and a 'Demonstrator Proposal' is being progressed to contract by January 2005 with the aim of proving the technology.



Meanwhile, the Aviation Working Group and Radar Sub Group are progressing on other initiatives, one of which is an improved pre-planning consultation process. The MOD has been taking the lead and intends to launch their *Consultation Information System* by the end of the year, making it easier for developers to submit inquiries and quicker for the regulators to assess and respond. The aim is to reduce current delays in response times to five weeks, providing a more efficient process for all.

Best Practice

While rapid progress is being made onshore, issues remain and new issues will always emerge. Of these, there are three priority issues which still potentially impact on meeting the 2010 targets. The first is the log jam of S.36 projects referred to above. Progress is being made and BWEA will increase its work with the Scottish Executive with the aim of unlocking more projects in 2005. The second issue has become more apparent following a BWEA conducted survey on behalf of the Renewables Advisory Board (RAB) which concluded that there are serious delays being incurred from planning consent to build. The most significant response from developers was that planning conditions and negotiation of planning obligations was adding a year or more to many projects before any ground was broken. This is one of the contributing factors to BWEA intending to work with TCPA and RTPI in 2005 in the production of Best Practice Guidance (BPG) on wind farm development to help planning authorities.

The Best Practice Guidance for planners could translate much of the work in 2004 into a productive and positive information tool to include:

- ✦ Generic planning conditions akin to wind energy development
- ✦ A protocol for community engagement and stakeholder consultation to follow on from the BWEA endorsed South West Community Protocol
- ✦ Model Criteria Based Policies for wind energy development in line with national policy statements



Ardrossan wind farm © Stuart Franklin / Magnum Photography



Llangwryfon © David Hurn / Magnum Photography



3H © Chris Steele-Perkins / Magnum Photography



Llangwryfon © David Hurn / Magnum Photography



Ardrossan wind farm © Stuart Franklin / Magnum Photography



Ardrossan wind farm © Stuart Franklin / Magnum Photography



3H © Chris Steele-Perkins / Magnum Photography



North Hoyle © Ian Berry / Magnum Photography



Llangwryfon © David Hurn / Magnum Photography



Llangwryfon © David Hurn / Magnum Photography



3H © Chris Steele-Perkins / Magnum



North Hoyle © Ian Berry / Magnum

Onshore

✈ Further information and guidance on community benefit and cumulative impact.

Last, but by no means least, is the issue of grid. The technical issues are being dealt with in other areas, but one thing is clear; grid capacity is being reached in a growing number of areas in the UK and there is an obvious need for new infrastructure. This will come with difficult siting constraints and complex associated planning issues which BWEA's Onshore team will be investigating in the coming months.

Small Wind Energy Systems

In October 2004, BWEA set up a Small Systems Focus Group, in order to take on issues related to small wind energy, particularly those of policy development, technology and marketing information, with the aim to push small wind into the wider market in the UK. Members of the Focus Group include BWEA's small wind turbine manufacturers and developers. All participants are taking actions on issues put forward by the group, in order to get the most benefits from a wide range of expertise and resources.

There are a wide range of issues relating to small wind in the UK and so far the Focus Group has taken action on the following issues. BWEA was involved in the consultation for the Green Alliance *A Microgeneration Manifesto*, published in September 2004, which outlines the political case for microgeneration in the UK. BWEA has also been feeding into a DTI funded project, which aims to identify possible solutions to the issues that could pose



© 2004 Renewable Devices Swift Turbines Ltd



Tebbutts Farm © Iskra Wind

barriers to microgenerators and/or their contractual counterparts in accessing the benefits of ROCs. Furthermore, BWEA has been invited to join several other groups, including Micropower Council and the European Union wide SWIIS Consortium, which aims to provide a better market for small scale wind at the European level.



Transport of a turbine tower © Collett

With the aid from small system members, BWEA is also producing an information pack for domestic customers, local authorities, small businesses and communities interested in installing small scale wind energy, including information on feasibility, planning and funding. 2005 is set to be an exciting year for small scale renewables, particularly with the start of the consultation for the Government's Microgeneration Strategy, and BWEA is looking forward to playing a key role in this.

Looking to the future

Clearly, there is plenty more work to do. BWEA's Onshore team remains focused and expects the unexpected. BWEA will continue to counter the myths, strengthen awareness and information provision, and input into policy making at all levels. Progress is being made and the future looks bright, but we cannot afford to be complacent. BWEA must maintain the momentum and rise to new and unforeseen challenges.

Offshore

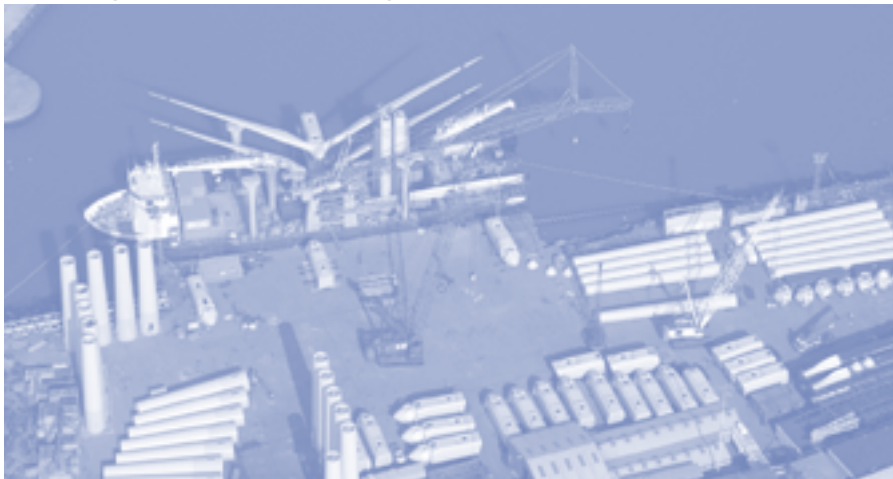
With progress being made on Round One projects and developers awarded sites for Round Two at the end of 2003, 2004 has been a very busy year for the offshore sector. Construction was completed this year on the UK's second large-scale offshore wind project, Scroby Sands, and 2005 promises completion on two other sites, Kentish Flats and Barrow. With further construction planned for 2006, sometime that year, the UK should become the world's number one offshore wind generator.

A substantial element of BWEA's Offshore programme work during 2004 was the coordination of Round Two developers' concerns over the lease on offer from the Crown Estate. Close examination of the documentation led to fears that independent finance would not be obtainable on the back of these contracts. Since these fears were shared across a wide section of the Round Two community, BWEA played an 'honest broker' function in talks with the Crown Estate. While in the end no material changes were made in the documents, considerable progress was achieved in gaining assurances from the Crown Estate that developers could proceed with confidence regarding the issues raised.

Energy Bill

Another key issue in the Offshore programme work has been the Energy Bill. This crucial piece of legislation includes clauses extending the legal framework for the consenting of offshore wind projects outside the 12 nautical mile territorial limit, and tidying up some of the issues for all offshore wind farms. As well as having to deal with opposition manoeuvring in the House of Lords from peers with nautical

A2SEA loading at Lowestoft Harbour © Mike Page



UK Offshore Wind Farms Round One

Location	Status	Capacity	Developer/Turbines
North Hoyle	Operation	60 MW	npower renewables (Vestas 2 MW)
Scroby Sands	Operation	60 MW	E.ON UK Renewables (Vestas 2 MW)
Kentish Flats	Construction	90 MW	Elsam (Vestas 3 MW)
Gunfleet Sands	Agreed	30 turbines	GE Wind
Lynn/Inner Dowsing	Agreed	60 turbines	Centrica
Cromer	Agreed	30 turbines	Norfolk Offshore Wind
Scarweather Sands	Agreed	30 turbines	United Utilities/Energi E2
Rhyl Flats	Agreed	30 turbines	Npower Renewables
Burbo Bank	Agreed	30 turbines	Seascope Energy
Barrow	Agreed	30 turbines	Centrica/DONG
Solway Firth	Agreed	60 turbines	E.ON UK Renewables
Shell Flat	Pending	90 turbines	ScottishPower/Tomen/ Shell/Elsam
Teeside	Pending	30 turbines	Northern Offshore Wind
Tunes Plateau	Pending	30 turbines	RES/B9 Energy

interests inserting clauses on shipping that could have been very dangerous, other amendments, such as changes to the Renewables Obligation, had to be dealt with. However, after six months of hard lobbying work with Government and MPs, the bill became the Energy Act in July 2004.

The progress of the Energy Bill through Parliament illustrated just how much work the wind industry needs to do to ensure the political consensus remains favourable. Following on from the lobbying efforts around the Energy Bill, BWEA engaged Citigate Public Affairs to help with the strategy and

Round One Offshore Wind Farms



Offshore

implementation of BWEA's political outreach work. While the approaching general election in 2005 is resulting in polarisation of most debates – including renewable energy – BWEA is working hard to minimise the political risk by keeping all parties committed to wind as part of the future energy mix.

Stakeholder Engagement

Beyond the political scene, there are many stakeholders in the offshore sector who must be kept informed about developments and included in the decisions that are made. BWEA's Offshore Programme has endeavoured to reach out to these various interests, through stakeholder fora such as the Fishing Liaison for Offshore Wind (FLOW) group and individual meetings with key players. As Round Two projects are readied to be submitted for consent during 2005, these stakeholder engagements must intensify, and BWEA now has a dedicated working group on this subject. BWEA has meanwhile continued its presence on the COWRIE research steering group. This research fund, made up of the interest from Round One refundable deposits, has been used to pay for generic environmental work, with application across the whole offshore programme. Using the much larger non-refundable option fees that Round Two developers have paid, Crown Estate is founding the COWRIE 2 fund to continue and expand this work. BWEA has a representative on the management board and will be involved with the steering groups that will manage the work streams.

Round One and Round Two Sites



Working Groups

Given the intensification of activity in the offshore area, it became clear that BWEA's work needed to be spread beyond the staff. Working groups have therefore been set up to support BWEA's Offshore Programme, initially around the work on the Energy Bill, and subsequently on Crown Estate issues and consenting and stakeholder dialogue. These are proving helpful in clarifying issues and spreading the workload. As the year has progressed, it has become clearer that the economics of Round Two are looking fragile, particularly given the confusion over ownership of the transmission grid, who pays for it and how it is charged. A

further, limited-term working group has been established to examine the costs and income of large offshore projects and recommend how any funding gap should be filled.

Another group that BWEA has been working through is its RO Review team. After much behind-the-scenes lobbying, narrow draft terms of reference for the Review were published in August 2004. The team's first job was to respond to those, and did so underlining the need for limited changes and assurance that the RO would be left alone for a long period after the Review had been completed. The team has also been involved in the consultation currently under way on the 'regular' yearly changes that the RO has been subject to – hence the plea for stability after the main Review. The current consultation is on extending the RO growth curve to 15.4% in 2015/16 and mutualisation of shortfalls to the buy-out fund, along with some other minor changes.



Scroby Sands towers © E.ON UK Renewables



BWEA staff outing to North Hoyle offshore wind farm © BWEA

Grid and Technical Affairs

As the volume of wind generation grows, increasing attention must be paid to the related technical and engineering challenges, not least of which is the issue of connection to the electricity network and the associated development of the UK electricity grid.

In recognition of this, BWEA appointed a Head of Grid and Technical Affairs in April 2004. In addition to the establishment of a Grid Steering Group, BWEA's work in this area has also addressed a number of technical issues, so far including variability, energy payback times, carbon dioxide savings, wind capacity factors, noise and integration of wind turbines on the grid.

Grid Codes

In April BWEA applied for and received DTI funding for a contract with Econnect. Under this contract Guy Nicholson attends meetings of the GB Grid Code review panel as the representative of generators with novel units (this including wind turbines). Guy also provides technical advice on proposed grid code changes and a monthly report for BWEA members on Grid Code issues.

BWEA provided a discussion paper for Ofgem's Grid Code Forum in April and has



Grid connection at Askam wind farm © Econnect

been instrumental in providing industry input to the proposed Grid Code changes to accommodate intermittent generation. As a result, a number of the more onerous proposals were removed.

Onshore Grid

Onshore grid issues have been dominated this year by the twin regulatory reforms of BETTA and the Distribution Price Control.

The continued development of the BETTA proposals, supported by Royal Assent for the Energy Act in July, resulted in much work on the reform of the Scottish Transmission system. The two major themes here are providing access to the system and the setting of transmission charges.

Despite NGC assurances at the start of the BETTA project, it is now clear that the Interconnector circuits between England and Scotland are a bottleneck on the system and will continue to be so for some time. The Ofgem/NGC proposals for providing access to the transmission system may result in projects facing delays in commissioning dates. In October, the transmission companies wrote to all generation projects requesting further information before NGC produce an offer to connect to the transmission system. BWEA, along with SRF, queried this process with both NGC and Ofgem and as a result, NGC agreed to hold two seminars in November (in London and Glasgow) to explain the new offer process.

In May and August, Ofgem produced proposals for allowing transmission companies to finance upgrades to the transmission system. This is a welcome development and BWEA responded to both the associated consultation documents.

BWEA and SRF have been developing revised proposals for provision of access to the transmission system and have set out initial thoughts in a number of this year's consultation responses. BWEA expects to be able to develop these further in 2005 as Ofgem has indicated that it intends to review transmission access arrangements after BETTA goes live.

NGC has developed proposals for transmission charging under BETTA. These proposals are detrimental to the development of renewable generation in Scotland. BWEA has attended all meetings of the GB Transmission Charging Methodology Forum in 2004 to ensure that the views of wind generators have been heard. BWEA has also responded to the various consultations on transmission charging.

Offshore Grid

There is as yet no offshore grid; however the provisions to establish offshore transmission licensees, issue offshore transmission licences and allow offshore transmission networks to be developed and regulated are contained in the Energy Act.

Grid and Technical Affairs

BWEA has attended meetings of the Wash Round Two developers and the Thames Estuary Round Two developers to provide updates on the offshore grid proposals.

BWEA has established an Offshore Grid Focus Group which consists of representatives of Round Two projects to provide a wind industry perspective on these developments. This group has met several times and provided support for the BWEA representations to the Energy Bill and to the DTI initiatives on offshore grids.



High voltage isolator © Econnect Ltd

In June, the DTI arranged a workshop for Round Two developers, Transmission Companies, Ofgem and the DTI to discuss issues relating to offshore grids. BWEA's Offshore Grid Focus Group attended this workshop as industry representatives.

Following this meeting, the Renewables Advisory Board established a sub-group to discuss offshore grid issues, with BWEA invited to participate as wind industry

representatives. This group approved the terms of reference for a DTI funded project to assess the practicalities, options and costs of connecting the Round Two projects. This project was awarded to Econnect and the final report is due to be published in December 2004.



© Econnect Ltd

The Ofgem consultations on identifying and regulating new offshore Transmission licensees which were expected in August 2004 have now been deferred until early 2005 to take account of the findings of this report.

Liaison/Representation

BWEA has attended a number of events and seminars on grid and technical issues, and has been invited as a wind industry representative to a number of other events including an Ofgem/IEE seminar on Engineering Recommendation P2/5, a DTI seminar on energy storage, and an IEA Topical Experts Meeting on Integrating Wind Energy to the Grid.

BWEA also maintains working relationships with other industry bodies including the Renewable Power Association, the Scottish Renewables Forum, and the Association of Electricity Producers.



© Econnect Ltd

Marine Renewables

At the start of 2004 BWEA began to take action on a strategic development decision that had been discussed and agreed with members throughout 2003, namely to champion the UK's marine renewables sector.

This decision was made on the understanding that the strengths and opportunities within BWEA would be able to help support this emerging sector. A further dimension was that the learning experience of offshore wind project development would allow for knowledge cross-over advantages to be gained by wave and tidal stream developers in the UK. On the basis of such progressive projections BWEA, with financial support from Greenpeace, expanded its mission with the appointment of a Marine Renewables Development Manager.

BWEA organised its first ever marine conference in February, following which the Marine Focus Group was set up, now 90 members strong. This group receives regular updates from BWEA on national and international developments, together with information on BWEA marine activities, often with the opportunity for participation. A Marine Steering Group has also been established from within this core group to guide BWEA's marine work strategy into the future.

The most prominent piece of work BWEA completed in 2004 on marine renewables was *Into the Blue*, a comprehensive and highly influential study into financing of this emerging sector. BWEA commissioned Climate Change Capital to conduct interviews with several players involved in the development of wave and tidal stream energy, to form a consensus on both the support mechanism and amount required. This, without a doubt, had a major part to play in the release by the DTI of £50 million in August, along with the prioritisations highlighted by the DTI/Carbon Trust Renewables Innovation Review. This amount is also complimented by £20 million in each of the next three years for R&D in all renewable energy technologies.

Since this announcement BWEA has continued to lobby with the conclusions of *Into the Blue* to ensure the creation of a support structure that those interviewed believed to be the optimal mechanism for successful development. BWEA has received continued recognition for this contribution from DTI and Treasury officials, particularly from new Energy Minister Mike O'Brien MP who recently stated that BWEA's work has "been extremely helpful in informing thinking on these matters".

A further dimension to BWEA's marine renewables work is communication and education to raise the profile of the sector and ensure that all interested and involved parties are working in a similar direction. BWEA has represented the marine renewables sector at many meetings and seminars, making the development of the industry a key consideration in a variety of fora. These include SEA workshops, fisheries meetings, environmental protection discussions, cabling



Stephen Timms MP with TIDEL device at BWEA marine conference, February 2004 © BWEA

debates and many other general offshore development gatherings. These have all been vital parts of the learning process for offshore projects and have also been excellent opportunities to talk about marine renewables with many of the bodies who will have to be consulted when this industry begins to take to the sea. BWEA is also consulting on the Marine Bill work, particularly with regards to marine spatial planning.

In doing this BWEA has built up good relations with such bodies and has been increasingly invited to present on behalf of the sector to, for example, the Welsh Assembly, MPs, RDAs, DTI, DEFRA, NGOs, The Crown Estate, RPA, SRF and at other various events that raise the profile of marine renewables both nationally and internationally.

Another major component of the promotional aspect of BWEA's marine work has been the launch of a marine-dedicated section at www.bwea.com/marine. Following the provision of funds by the DTI, BWEA is in the process of redesigning these with the aim of developing an information portal to the world's most exciting country for wave and tidal stream energy. BWEA fully expects this new site to really encapsulate the growing professionalism and enthusiasm within this emerging sector.

The rising status of marine renewables in the UK will be evident in BWEA's second annual conference in March 2005 at the IMAX Theatre in London's Science Museum. The programme is excellent, comprising the world's leading finance, policy, development and energy experts and will be the benchmark by which all other such events will be judged.



Pelamis device © Ocean Power Delivery

BWEA has only been involved in marine renewables for a short time, but in that period there has been a step change in the sector: Government support has risen from £15 million over five years to £50 million for the next three, the world's first full scale testing facility has opened, EMEC in Orkney, allowing Pelamis to produce the UK's first ever offshore wave energy into the National Grid, and the marine environment is now discussed regularly by front bench politicians as a vital energy resource. The future of the

wave and tidal stream sector therefore looks promising and BWEA will continue to be at the centre of this, providing support and guidance to those of its members who are interested and involved in what could be the most interesting and exciting power sector in the world.

Communications

2004 was an exceptional year for BWEA's Communications team, ensuring that the Association's aims and objectives were communicated to key audiences through the use of online and offline media and the management of a professional external events programme.

Three major events were organised in-house, attracting well over 1,100 delegates in addition to an impressive list of speakers; BWEA successfully initiated a series of regional planning seminars, with attendance from 700 planners and Councillors; BWEA represented the wind industry with UK villages at two overseas events, with funding to take 24 UK companies to exhibit; in addition to supporting two key events and participating in the Labour Party Conference. See pages six and seven for full details of BWEA's events activities.

The Communications team increased in 2004 with the appointment of a Programme Assistant to provide support across BWEA work's programme and facilitate information collation and dissemination.

The team undertook a review of existing BWEA literature with a view to providing standardised industry information, accessible to member companies and the public alike, which culminated in the production of a new set of briefing materials.

BWEA's online presence was considerably enhanced in 2004, with an increase of information provision at www.bwea.com, reflecting the Association's expanded work programme and the launch of two new campaign websites.

2004 will be remembered as the year when the debate on the future of energy supply and the role of wind energy reached critical mass. BWEA's media activities grew concordantly with a significantly enhanced profile in this debate.

Web and IT

BWEA's award winning website www.bwea.com continued to lead the way as the key tool in the communications strategy. An average 1,180 visitors per day visited the website in 2004, looking at four or more pages - an increase of 34% on last year's average 880 daily visits. Meanwhile 160 searches of BWEA's online Company Directory were recorded every day, redesigned to cope with the huge demand, clearly demonstrating its value in providing contacts within the wind industry.

2004 saw the introduction of a marine-dedicated section of the website, given the Association's expanded mission to champion this emerging sector. BWEA also introduced a first in its electronic communications by producing the proceedings of the industry's 26th annual conference in a password protected audiovisual online format.

BWEA also created two successful new campaign websites, www.catch-the-wind.com and www.embracewind.com. The *Catch the Wind* website registered over

5,000 visits during the campaign, well above the target of 2,000 set as one of the objectives. The *Embrace the Revolution* website has proved as popular as the campaign itself, averaging 10,000 visits a month since launch in September.

BWEA's IT also expanded in 2004 with the facility for secure virtual private networking, allowing staff to be in the office wherever there is an internet connection. This has been invaluable for home and travel working given BWEA's significantly expanded work load.

Work also commenced on the integration and automation of BWEA's many web, contact and member databases. The first, a web based dynamic mapping tool for UKWED, will be launched in 2005, when BWEA's database of all planned wind energy projects will be available in map form alongside automatically generated statistics for members only.

Wind Energy in the Media

BWEA's TV, radio and print presence hit the headlines in 2004 with the team appearing in national and regional broadcast media throughout the year and a number of BWEA stories gaining wide coverage nationally and locally.

Much of the media work throughout the year was dominated by responding to a series of stories, many placed by wind energy opponents. Work increased in the latter half of 2004 with pro-active placement of positive coverage of key BWEA initiatives. For example major exposure for the launch of BWEA's *Embrace* campaign was achieved in national print and broadcast media, and significantly higher levels were achieved regionally.

Notable broadsheet coverage over the course of 2004 includes *The Financial Times*, *The Guardian*, *The Independent*, *The Observer*, *The Telegraph*, *The Times* and even *The Daily Express*. Online news has been another key avenue for coverage with stories posted at BBC News Online, Reuters, Dow Jones and PA.

To date some 150 national and regional TV and radio interviews have been undertaken by BWEA staff, with notable programmes including BBC's Countryfile, the BBC 2 'If ... the lights go out' docudrama, BBC Radio 4 Today, You and Yours and World at One, and BBC Radio Wales.

A new ISDN 'studio' has been installed at BWEA's offices to enable greater access to the media as the *Embrace* campaign is rolled out in 2005.



Publications

Why Wind?

This booklet was designed for mass distribution and use by all, from project developers to local planning authorities, communities and people with a general interest in the subject. *Why Wind?* answers some of the commonly asked questions about wind energy; why do we need it, how wind farms are developed and sets the record straight on common misconceptions about wind technology.


Published in July 2004, it proved to be popular with its intended audience and the original print run of 20,000 is now out of stock. While it is still available electronically through the website, BWEA will reprint *Why Wind?* in 2005, incorporating recent changes in the industry.


Available to download from www.bwea.com/ref/whywind.html

Briefing Sheets


BWEA has produced a set of standardised briefing sheets to be used as information sources by a wide range of audiences, from industry through to the media and the general public. Fully referenced to external authoritative sources, the briefing sheets present the latest status on key aspects of the wind industry, and provide the industry position on a variety of issues.


Written and designed in-house, and peer reviewed by the BWEA Board, the factsheets are produced with limited print runs, but are available in both low and high resolution format through the BWEA website, for members and other interested parties to print off as required. This allows the latest facts and figures to be incorporated through regular updates to ensure that the industry position is maintained.

 *Wind Energy and the UK's 10% Target* – a comprehensive overview of energy policy and the role of wind energy, the current status of the industry, costs, including back-up, and the benefits already evidenced in the sector

 *Wind Turbine Technology* – how wind turbines generate electricity and the factors affecting production, how electricity from a wind turbine is distributed to homes and businesses and the reliability of wind as a power source

 *Offshore Wind* – the potential of the UK's offshore wind resource, the technology of development at sea and the latest status on Round One and Two of development, including project location maps

 *Benefits of Wind Energy* – summarises emissions reductions, energy security, employment opportunities, community benefits and the advantages of embedded generation

 *Public Attitudes to Wind Energy in the UK* – reviews the 13 years worth of opinion polls conducted in the UK, and provides headline findings of the latest surveys and local residents and before and after surveys, and introduces the *Embrace* campaign.

BWEA will continue to publish in the series, with *The Economics of Wind Energy*, *The Variability of Wind Energy* and *Onshore Wind* next off the production line.

Available to download from www.bwea.com/energy/briefing-sheets.html

Wind Energy and Planning: An Overview

Published in August 2004, this research by BWEA examined planning decisions since 1999 to investigate delays within the planning system given industry concerns that the 2010 targets could be in jeopardy.

The major conclusions of the research were that in England, time taken for projects in planning has increased from an average of 9.4 to 11.2 months, three times that of the guide length of 16 weeks for major applications; Section 36 projects in Scotland are taking between two to three years to come to a determination while the most worrying trend is that only 5% of wind energy schemes are determined within 13 weeks. This data is significantly out of step with other major projects, 44% of which are determined within 13 weeks.

BWEA made three key recommendations, calling for more resources for decision making authorities, the immediate publication of PPS22 and streamlining and simplification of the process to minimise post planning condition delays.

Available to download from www.bwea.com/planning/planningdelays.pdf

Into the Blue: Financing the Future of the Emerging Wave and Tidal Power

This study was undertaken for BWEA by Climate Change Capital, a specialist merchant banking firm focusing on climate change and energy security, and examined the level and type of financial support that the sector needs to move it forward from its current research and demonstration phase.

Over 45 companies, organisations and individuals from the city, the utility sector, the wave and tidal industry and from within Government were interviewed over a two month period. The report, published in May 2004, recommended a series of actions that were presented to Government and others, and contributed to the release of £50 million for the sector from the DTI's Spending Review.

Available to download from www.bwea.com/marine/intotheblue.pdf

BWEA Staff and Board Members

BWEA Board Members (listed alphabetically) & Main Responsibilities

Megan Arnold, SLP Energy
Supply chain, Conferences and PR

Nigel Crowe, GE Wind
Turbine technology & development

David Farrier, E.ON UK Renewables
Offshore Wind

Rob Hastings, Shell International Renewables Ltd
Offshore Wind

David Hodgkinson, AMEC Wind Energy
International Issues

David Milborrow, DM Energy
Grid and system integration, general technical issues & academic liaison

Alan Moore, BWEA Chairman
Housekeeping & business plan

Chris Morris, Wind Prospect
Renewables Obligation, Health & Safety

Alan Mortimer, ScottishPower
Scotland and SRF

Bill Richmond, Your Energy Ltd
Planning & the regions, aviation

Chris Shears, Renewable Energy Systems Ltd
Northern Ireland, aviation, birds & conservation

Marcus Trinick, Bond Pearce Solicitors
Wales, Planning and Legal Issues



Marcus Rand
Chief Executive



Richard Ford
Head of Grid & Technical Affairs

Main responsibilities:
Transmission Distribution and
Regulation



Chris Tomlinson
Head of Onshore Wind

Main responsibilities:
Development and Planning
Issues



Georgina Wong
Planning Advisor

Main responsibilities:
Monitoring the UK planning
framework



Gordon Edge
Head of Offshore Wind

Main responsibilities:
Offshore Wind, RO Review,
European Policy



Michael Hay
Marine Renewables
Development Manager

Main responsibilities:
Wave and Tidal Energy



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Head of Communications

Main responsibilities:
Public, Media and Industry
Relations



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Events Manager

Main responsibilities:
Conferences and Events



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Main responsibilities:
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Small Wind Energy Systems



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Web & IT Manager

Main responsibilities:
Web, Network



Graham Brind
Finance Manager

Main responsibilities:
Accounts, Company
Secretary



Juno Sambrook
Office Manager

Main responsibilities:
Membership, Front of House

Appendices

Consultation Responses 2004

Onshore Consultation Responses 2004

PPS22 (Planning Policy Statement 22: Renewable Energy)
TAN8 (Technical Advice Note 8: Renewable Energy)
Reforming Planning in Northern Ireland
Proposed Amendments - Building Regulations Part L
Scottish Planning Policy – Rural Development
Sustainability Appraisal of Regional Spatial Strategies and Local Development Frameworks – Consultation Paper

Grid Consultation responses 2004

Small Generator Issues under BETTA - OFGEM/DTI
Transmission Investment and Renewable Generation - NGC
Options for Allocating GB Transmission Access Rights under BETTA - NGC
Transmission Investment for Renewable Generation – Second Consultation - Ofgem
Grid Code Consultation H/04 - Grid Code Changes to Incorporate New Generation Technologies and DC Inter-connectors (Generic Provisions) - NGC
Scottish Grid Code Review Panel Consultation SA/2004 - Consultation on Technical Requirements for Wind farms - Scottish GCRP
Initial allocation of GB transmission system access rights under BETTA - Ofgem
GB Transmission Charging – Final Methodologies Consultation - NGC
Transmission Investment for Renewable Generation – Initial Proposals - Ofgem
GB charging – consultation and impact assessment - Ofgem

Offshore Consultation responses 2004

Renewables Obligation Order 2005 Statutory Consultation
Renewables Obligation Review Terms of Reference consultation
Renewables Obligation Scotland Review Terms of Reference consultation
Maritime and Coastguard Agency's consultation on Marine Guidance Note 275

Small Scale Renewables consultations responses 2004

A Microgeneration Strategy - Green Alliance
Barriers to small-scale renewable energy generation in London - London Assembly Environment Committee
Workstream 4 Project P04: Accrual of ROCs and LECs for small generators - Jade Energy

Onshore Planning Representations March-November 2004

Development Plans

Aberdeenshire Draft Green Energy Strategy
Argyll & Bute LP Review

Ayrshire JSP Consultation
Carlisle LP Deposit Consultation
Cambridge Local Plan Revised Deposit
Cornwall SP Proposed Modifications
Crewe & Nantwich LP Proposed Modifications
Cumbria JSP Proposed Changes
Devon SP Proposed Modifications
Dorset SP Deposit
Perth & Kinross Draft Wind Energy Policy
East Staffordshire LP Proposed Modifications
Falkirk SP 1st Alteration
Gloucestershire SP Proposed Alterations
Greenwich UDP Pre-Inquiry Changes
Herefordshire UDP Deposit
Hull & East Riding JSP Proposed Modifications
Lancashire JSP Proposed Modifications
Lincolnshire SP Deposit
Malvern Hills Local Plan 2nd Deposit Draft
Moray Development Plan Issues and Options
North Lincolnshire LP SPG13
Nottinghamshire EIP Questions
Northumberland JSP Deposit
Northumberland JSP Proposed Modifications
Rugby LP Review
Rutland Draft Countryside Guidance
Scottish Borders LP Review
South Hams LDF Issues & Options
South Lanarkshire LP Issues & Options
Taunton Deane LP Review

Regional Policy

RPG 8 Proposed Changes
RPG9 Proposed Alteration
RPG12 Proposed Changes
RPG 13 Draft Deposit

Presentations, Workshops and Examination in Public Planning Panels

Dorset RE Strategy Consultation Event
DTI Dorset Pilot Planners Event
Hampshire Renewable Planning Workshop
Good Practice Guidance for Visual Impact Assessment of Wind Farms workshop (Edinburgh).
Northumberland Renewables Workshop; & Kinross WE Policy Workshop
Nottinghamshire Structure Plan Examination in Public
Regional Planning Guidance 13 Partial Review Examination in Public

Appendices

Wind Developers Forum for the South West Public Engagement Protocol (www.regensw.co.uk)

BWEA Planning Documents

Wind Energy and Planning: An Overview www.bwea.com/planning
Criteria Based Policy for Wind Energy www.bwea.com/planning

Presentations given by BWEA staff in 2004

Marcus Rand, CEO

BWEA Wave & Tidal Conference - Opening Address
DTI Investors Day, The Energy Bank - London
Into the Blue presentation to HM Treasury - London
Keynote Address BWEA Annual Conference
Praseg Annual Conference - London
Key note address - Opening of Ardrossan Wind Farm – South West Scotland
New Statesman Fringe, Labour Party Conference - Brighton
Presentation to Renewables Advisory Board - London
Key note address - Opening of Gamesa HQ in Wales
Sparks and flames – Amsterdam, The Netherlands.
House of Commons, Scottish Power debate - London

Alison Hill, Head of Communications

Global WindPower – Chicago, USA
National Federation of Women’s Institutes – Llandudno, Wales
Construction Industry Environmental Forum – Manchester University
All-Energy Opportunities - Aberdeen
Wind Energy 2004 International Trade Fair – Hamburg, Germany
Planning for Wind Energy – Cumbria
Centre for Renewable Energy Systems Technology Summer School –
Loughborough University
Green Gadgets – London
BWEA26 – Manchester
RPA Yearbook Launch - London
Loughborough University – Loughborough
Renewable Energy Weekend – Natural History Museum, London
EWEC - London

Chris Tomlinson, Head of Onshore Wind

All-Energy Opportunities - Aberdeen
Community Renewables Initiative Conference - Bamber Bridge
Sussex Planners Conference - Eastbourne
Smart Energy Conference - London
BWEA26 - Manchester

Planning Summer School - Reading
EWEC - London

Georgina Wong, Planning Advisor

South West Renewables Futures Conference Presentation – Criteria Based Policy
BWEA26 - BWEA – Manchester - Planning Delays

Gordon Edge, Head of Offshore Wind

BWEA Offshore conference – London
Global WindPower – Chicago, USA
Energy Institute branch meeting - London
Commercial conference on renewables – Paris
Coastal planning conference – London
All-Energy Opportunities - Aberdeen
City Power Club – London
EWEC - London
Three to trade-promoting fora - Denmark, Berlin and London

Michael Hay, Marine Renewables Development Manager

All-Energy Opportunities - Aberdeen
Renewables UK Workshop, RegenSW – Bristol
PLANED, Haverfordwest - Wales
DTI Exports Workshop - London
Renewables in Action Conference – London
NASEG, Welsh Assembly - Cardiff
PRASEG, House of Lords - London

Richard Ford, Head of Grid & Technical Affairs

BWEA26 - BWEA - Manchester
Rewiring Scotland - SRF - Edinburgh
EWEC - EWEA – London
Transmission Issues Working Group - the DTI/Ofgem/Transmission companies’
forum

Glossary

Communications

Publications with editorial provided by BWEA

Power UK - February 2004
Refocus - February 2004
Energy Industries - March 2004
Government Business Magazine - March 2004
DTI Guide to RE Co's 2004
Ecologist Debate - March 2004
UK Power - March 2004
Sustainable Development UK - April 2004
UK Power - April 2004
Public Service Review - July 2004
Sustainable Enterprise - October 2004
edie - October 2004
UK Power Talking Point - November 2004
elements magazine for Environment Council - November 2004
Parliamentary Yearbook - December 2004

ADT	Advanced Digital Tracker
AM	Assembly Member (Wales)
BPG	Best Practice Guidelines
BETTA	British Electricity Trading and Transmission Arrangements
BWEA	British Wind Energy Association
COWRIE	Collaborative Offshore Wind Research Into Environment
CTBTO	Comprehensive Nuclear Test Ban Treaty Organisation
DTI	Department of Trade and Industry
EIA	Environmental Impact Assessment
EIP	Examination in Public
EWEA	European Wind Energy Association
EWEC	European Wind Energy Conference
FLOW	Fishing Liaison for Offshore Wind
GW	Gigawatt
IEA	International Energy Agency
IEE	The Institution of Electrical Engineers
IT	Information Technology
km	Kilometre
MW	Megawatt
MOD	Ministry of Defence
MP	Member of Parliament
MSP	Member of the Scottish Parliament
NATS	National Air Traffic Services
NGC	National Grid Company
NGO	Non-Governmental Organisation
NOP	National Opinion Polls
NPPG6	National Planning Policy Guideline (Scotland)
Ofgem	The Office of Gas and Electricity Markets
OTS	Opportunity to see
PA	Public Affairs
PPS22	Planning Policy Statement; Renewable Energy
PRASEG	Parliamentary Renewable And Sustainable Energy Group
RAB	Renewables Advisory Board
RDA	Regional Development Agency
RO	Renewables Obligation
ROC	Renewables Obligation Certificate
R&D	Research & Development
RTPI	Royal Town Planning Institute
RSPB	The Royal Society for the Protection of Birds
SEA	Strategic Environment Assessment
Section 36	(S.36) refers to a project determined under Section 36 of the Electricity Act (1989) as it is above 50 MW capacity, although the Local Planning Authority remains a statutory consultee
SRF	Scottish Renewables Forum
TAN8	Technical Advice Note (8)
TCPA	Town and Country Planning Association
UKWED	United Kingdom Wind Energy Database

BWEA Membership

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Centre for Sustainable Energy
Centrica Energy Management
CG Property
Chalcroft Construction
Charles W. Taylor & Sons Ltd
Clarke Energy Ltd
Climate Change Capital
Clipper Windpower UK
CLRC, Rutherford Appleton Laboratory
CNS Subsea Ltd
CO2e
Collett Transport Ltd
Cornwall Consulting
Cornwall Light and Power Co Ltd
Coronation Power Limited
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CSL Bird Management Unit
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Devon Wind Energy Limited
DeWind UK Operations
DLA (Partnership)
DM Energy
Dong VE A/S
Dowding & Mills Engineering Services
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GE Wind Energy
Geo Plant bv
Geotrupes Energy
Global Marine Systems Ltd - Energy Services
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Hydrotechnik UK Ltd
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Impax Capital Corporation
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Independent Power Systems Ltd
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ITI Energy
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North British Wind Power Limited
North Energy Associates Ltd
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Novera Energy
Npower Renewables
Nsure Renewables
Nuon Renewables
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OCP Cable Protection Ltd
Offshore Renewable Energy Alliance Ltd
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Proserve Ltd
Proven Engineering Products Ltd
QinetiQ Ltd
R.D.C. Ltd
Redfield Consulting Limited
Renergys GmbH - Renewable Energy Solutions
Renew North
Renew Tees Valley Ltd
Renewable Devices Ltd

Renewables East
Renewables North West
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RES Group
ReSoft Ltd
Ridge Wind Ltd
Risk Mitigation Geoservices Ltd
RJ McLeod (Contractors) Ltd
RMB Engineering Services
Royal & SunAlliance
RPS Group
RSK Environment Limited
Rural Land Services
Ruston Wheb
Saipem s.a.
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Scottish & Southern Energy plc
ScottishPower
Screwfast Foundations Limited
Seabed Scour Control Systems Ltd
Seacore Ltd
SeaRoc UK Ltd
SeaWind
SgurrEnergy Limited
Shaw Power Technologies International
Shell WindEnergy Ltd
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Talisman Energy
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Titan Environmental Surveys Ltd
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Toby Manning Limited
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Trac International Ltd
Tractebel Energy Engineering
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Triodos Bank / Triodos Renewable Energy Fund
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Underwater Security Consultants Ltd

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Windelectric Management Ltd
Windfarms Ltd
Windmade Energy Ltd
Windspeed Ltd
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WKN Windkraft Nord AG
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Wynns Limited
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Sponsoring Members of BWEA





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